Rhode Island's
Access to Recovery

STATE USER MANUAL

VERSION 1.1
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TIPS FOR USING THE APPLICATION EFFECTIVELY

Recommended Computer Settings

Screen Resolutions

You will get the best screen layout if you set your PC monitor settings to 1024 X 768 or larger. If your screen resolution is smaller (e.g., 800 x 600 pixels), everything on the screen will appear larger. But, if you use 800 x 600 pixels you will have to scroll more both up and down and left and right to access all the data fields.

Pop-Up Blockers

Modern computer security technology and usability features development have led to pop-up blocking. Although this new feature of Internet browsers, toolbars and other 3rd party managing software blocks hazardous and annoying pop-ups, sites like the RI ATR application require pop-ups to be able to function. If your pop-up blocker is enabled, then there is a possibility that the RI ATR application may not function or appear properly. You should either disable the pop-up blocker while using the RI ATR application (while remembering to enable it, if desired, when not using the RI ATR application) or create exceptions for the pop-up blocker. Although enabling and disabling the pop-up blocker may be cumbersome, it may be easier than making exceptions to the pop-up blocker.

To create exceptions for the pop-up blocker, open your internet browser window. If using Internet Explorer, click the top toolbar option “Tools” and then go to “Internet Options”. After the Internet Options window is available, you will want to click on the “Privacy” tab at the top of the window. You will notice while on the “Privacy” tab at the bottom will be a section on Pop-Up Blockers. If you “Block pop-ups” checkbox is checked, click on the “Settings” button to allow for exceptions. If using Mozilla Firefox, click the top toolbar options “Tools” and then go to “Options”. After the “Options” window is available, you will want to click on the “Content” tab at the top of the window. If you “Block Popup Window” is checked, click the “Allowed Sites” button to the right to allow for exceptions.

You can now add the RI ATR application links to the “Allowed Sites” list which the pop-up blocker will ignore when trying to block pop-ups from the RI ATR application. You will want to add https://kitservices2.kithost.net/riatr/ for the Live system and http://demo.kithost.net for the Training system. Once these sites are added to your “Allowed Sites” list, the pop-up blocker should no longer prevent pages from loading and appearing while you are using the RI ATR application.

Print Icon

The RI ATR Application has the print icon for easier access to viewing reports, you may need to have Active X installed on your computer to utilize the icon. Active X is a free download that should allow you to use the print icon, click on this link to access the Active X site: http://www.download.com/windows/activex/1921-2206_4-0.html If you are unable to download Active X, contact your organization’s IT department. Firefox does **not** official Support AciveX. http://support.mozilla.com/en-US/kb/ActiveX

*Note: These are instructions for Internet Explorer 6.0 and may be different for other Internet Explorer versions.

Application Navigating

The RI ATR Application is set up in such a fashion that moving from Left to Right on the menu is the best approach to using the application. Start at Assessment, filling in all the information for that area before moving on to the next section. Continuing in this manner will ensure that all of the sections of the application have enough information to function correctly. If all of the different portions are not completed, some modules will not work correctly.

Computer Keys

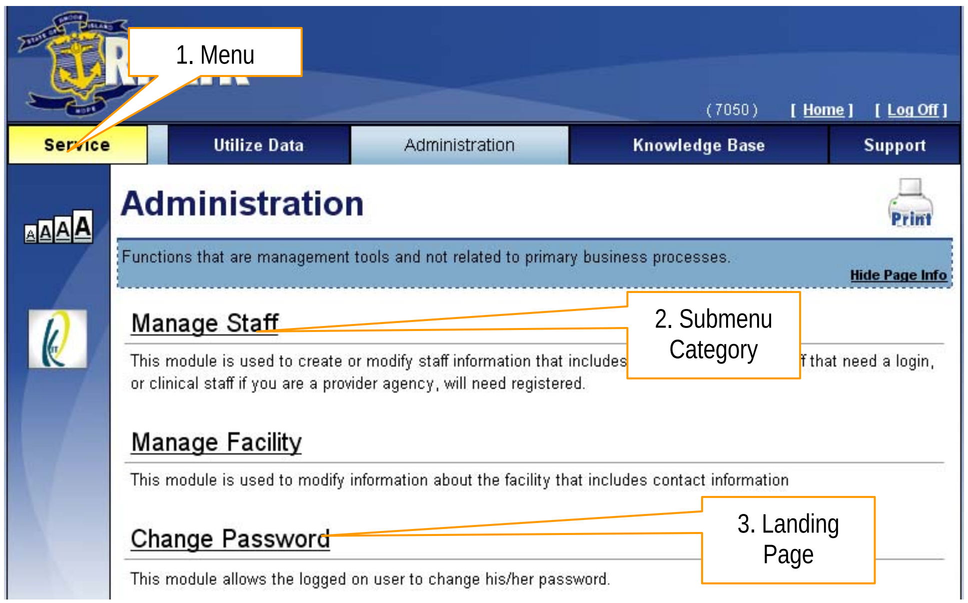
While entering information into a form, several keys are helpful for moving the cursor from one information box (called a data field) to another. The table below summarizes those keys:

Key	Description	Function
	The Cursor	Points to desired location
	The TAB key	Moves the cursor to the next data field
	Hold down the SHIFT key and then press the TAB key	Moves the cursor to the previous data field
	The Control (Ctrl) key	Enables blocked material to open (due to pop-up blocker)
	Use the MOUSE by pointing and clicking to move the cursor	Moves the cursor by pointing and clicking

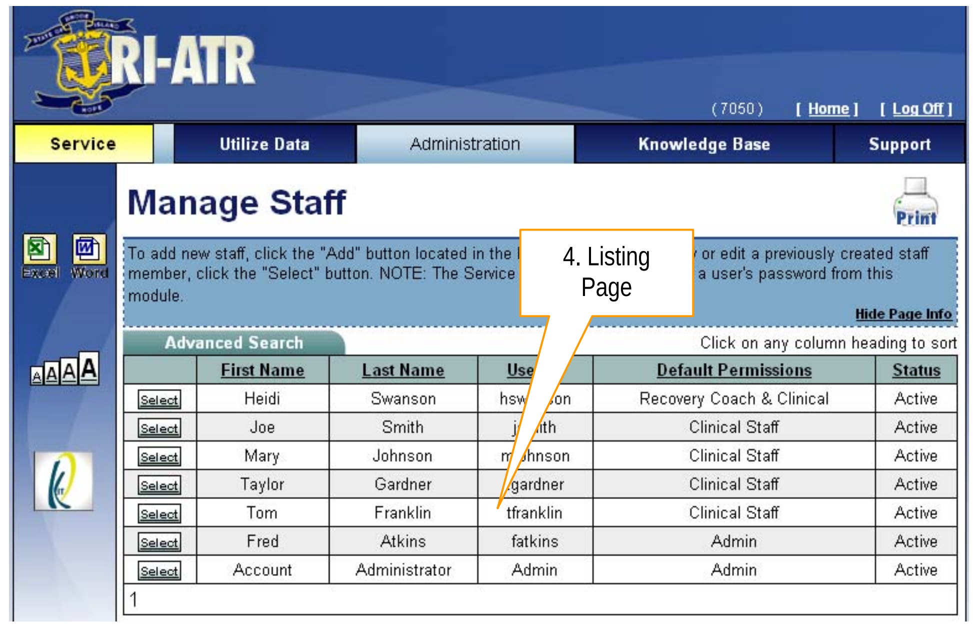
Menu Information

The Menu for theapplication is located across the top of the screen. Some Menu categories may be broken down into submenu categories to choose from. The Menu categories list the main modules that are within the application. When a Menu category is selected a list of submenu categories will be displayed on the Landing Page as links to access the modules. (For more information on Landing Pages, see the Landing Page section.)

1. Menu	Constant (unchanging). Available at all times.
2. Submenu Category	Varies depending on which Menu category is selected.
3. Landing Page	Varies depending on which Menu category is selected.
4. Listing Page	Varies depending on which submenu category is selected.

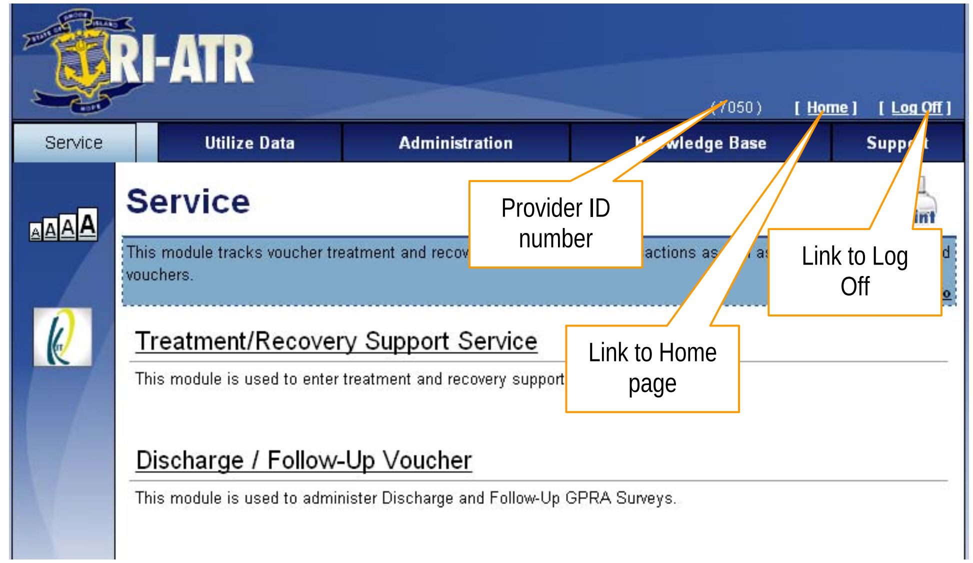


(This is a screenshot displaying the Menu (1), Submenu (2), and a Landing Page (3))



(This is a sample screenshot displaying a Listing Page (4))

The top of the menu provides links to the [Home] (Home) page and to [Log Off] (Log Off) of the application. The Provider ID number is listed as well as the user currently logged into the RI ATR application. If you click on the user link you will be taken to that user's information which was entered in the Administration module within the Manage Staff Profile Submenu category.

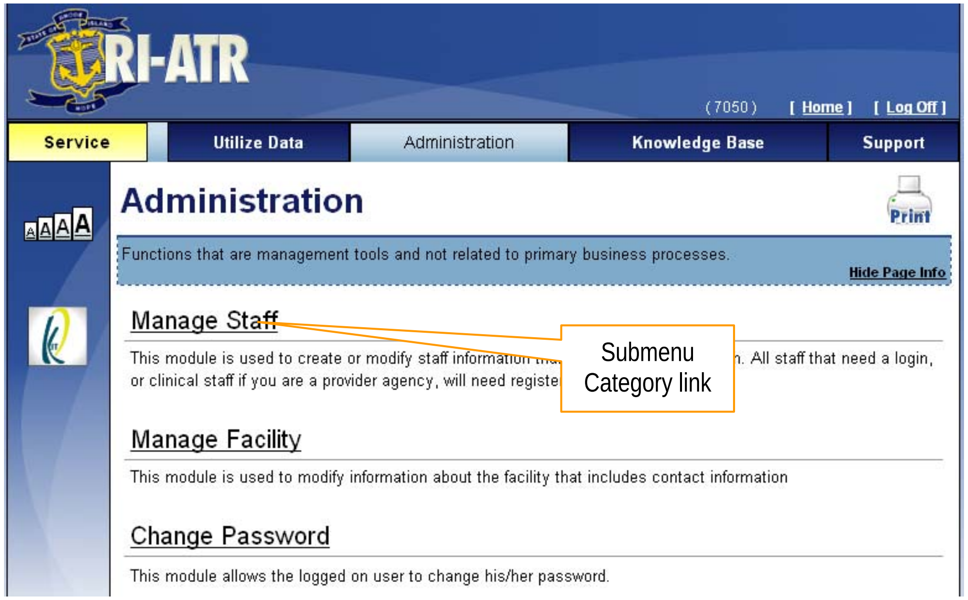


Landing Page

When first entering a main module you will see a list of the entire submenu categories associated with that module. This is called a "Landing Page". The Landing Page of each module provides a description of what can be done in that module as well as listing each submenu category as a link to the Listing Page and entry forms. (For more information on the Listing Pages, see the Listing Page section.) No data is entered on the Landing Page.

To open a category:

- Click on the Submenu Category Landing Page link.



(This is a partial screenshot displaying a Landing Page)

Tips

- **Hide Page Info** Allows the module description to be hidden from view
- **Show Page Info** Places the module description back in view

Listing Page

After selecting a category from the Landing Page you will see the “Listing Page”. When going into an area where a Listing Page is available, the service allows you to select previously entered data to edit or view its content. No data is entered on the Listing Page.

- When viewing a Listing Page, all of the data is available for Searching. (See the Advanced Search section for more details on searching.)

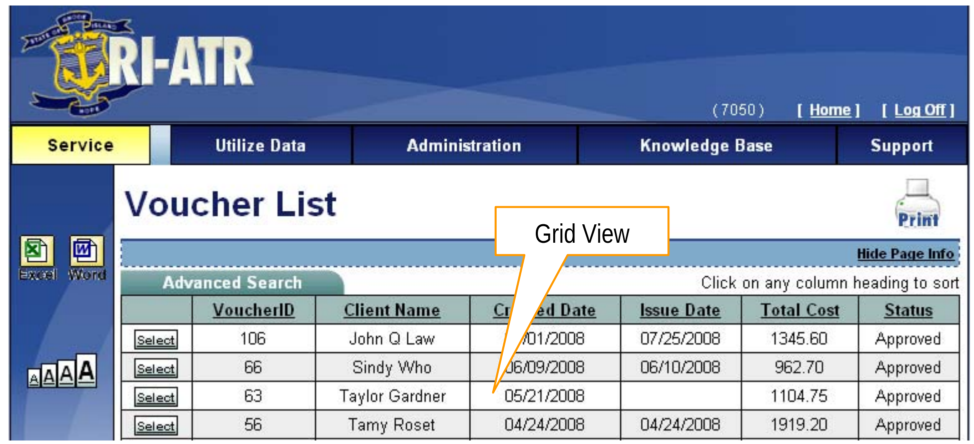
There are three types of Listing Pages:

1. Grid View
2. Hierarchy View
3. Single Form View

Grid View

The Grid View displays the data in tables. Specific pieces of data will be displayed within the Grid based on the fields within the entry/edit form.

1. When first viewing a Listing Page, all of the data is available for Searching. Click the Select (Select) button to the left of the data you would like to edit/view.
2. You will be taken to the entry/edit screen. This page will be in edit mode (all data fields will be open for data entry). Make any changes needed to the form. Click the Save (Save) button to save the changes.



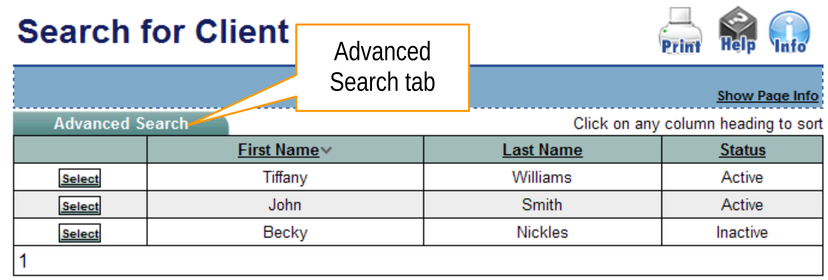
(This is a sample screenshot displaying a Listing Page)

Tips

- Clicking on the field name in a Category field (e.g., First Name) will allow you to sort through your files in ascending or descending order.
- The Page numbers (e.g. 1 2 3 4 5) beneath the grids allows to you move from page to page within the specific listing page. There is a maximum of 8 items in a grid, so once you exceed 8, the application automatically updates the grid to page 2. To get to a desired page click on the number and you will go to that specified page.

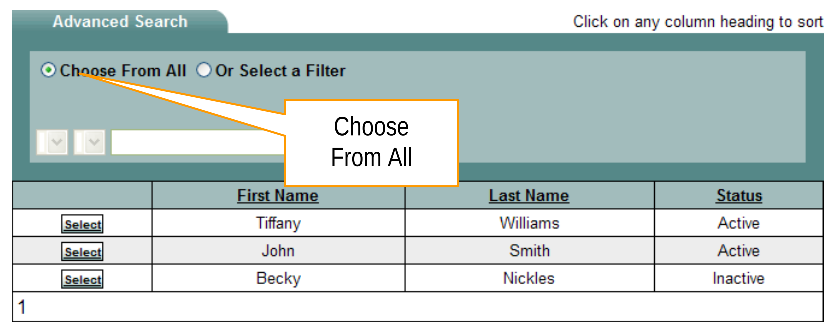
Advanced Search

- To filter a search, click the Advanced Search (**Advance Search**) tab located at the top of the Grid.



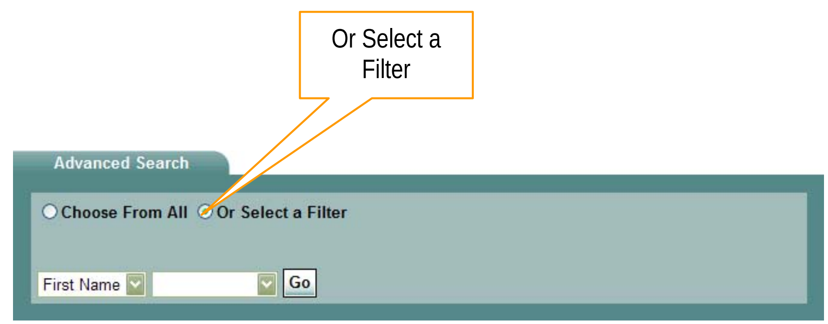
(This is a sample screenshot of a Data Grid displaying the Advanced Search tab.)

- Click the Choose From All (**Choose From All**) radio button to see a list of all data that has been entered.



(This is a sample screenshot of the Advanced Search displaying the **Choose From All** option selected.)

- The Or Select a Filter (**Or Select a Filter**) option allows you to limit search results. To change the search filters, first click the Or Select a Filter radio button. Then select an option from the three search filter fields. Once the three search filter fields have been selected, click the Go (**Go**) button to see the search results.



(This is a sample screenshot of Advanced Search displaying the **Or Select a Filter** option selected.)

- The three search filter fields are used in the following methods:
    1. The first search filter will display the search categories to choose from.
    2. The second search filter allows you to specify how you wish to search.
    3. The third search filter is the search criteria. This field will change based on the second search filter selected.

Single Form View

The Single Form View is used when the data entered is updated periodically. Only one form is available and edited. The Single Form View displays the fields on the Edit Form.

- The form can be edited at any time, but you must click the  (Save) button to update the data.

(This is a sample screenshot displaying a "Single Form View" Page.)

Edit Forms

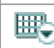
The Edit Form contains the fields for entering and editing data. The buttons for saving, cancelling, deleting, printing, and in some cases, adding and editing, are available at the top right of the page. (See the Data Fields & Buttons section for additional details on the function of these buttons.)

- If you clicked the (Add) button to enter new information into a form, the Edit Form data fields will be blank.
- When selecting the (Select) button to view existing data, the Edit form data fields will display the data entered/selected previously. These fields may be modified, if needed.

(This is a sample screenshot displaying a blank Edit Form.)

Data Fields and Buttons

In the RI ATR application there are several fields, boxes and buttons that are used to collect and store data.

Type	Preview/Description
Text Field (aka Text Box)	(fill in the blank)
Dropdown List (aka Pull Down Menu)	Please Select (select one)
Radio Buttons	Selected Not Selected
Check Boxes	Selected Not Selected
First Name *	A yellow field with an asterisk denotes a required field
	Denotes a Note with more information regarding the field
	Indentifies potential errors in text and provides suggestions to correct the errors.
Calendar	 (See the Calendar section for additional details.)

It does not matter the order in which the above fields are filled in, but if a required field is not filled in and you try to save the form, you will receive a message informing you what field is missing data and you will not be able to save the form until that field has data.

Tips

- All the fields within a yellow box are required fields. These must have a value entered before the record can be saved. Field will be filled in if not entered at save.
- You can type an identifying letter of an item in a dropdown list and the first selected beginning with that letter will appear in the box.

Edit Form Buttons

Information is entered and edited on the computer screen through data entry/edit forms. The table below summarizes the buttons used to enter/edit information located to the left of each form. This is referred to as the "left toolbar".

Add	Must be pressed first to add new information to a form
Save	Adds the information on a form to the RI ATR database
Delete	Removes the information currently on a form from the RI ATR database
Cancel	Cancels the Add or Edit without saving any information entered
A A A A	Changes the text size by clicking on one of the different sized As (For more information, see the Using the Text Resizer section)
Excel	Opens an Excel spreadsheet displaying the information on the Listing Page
Word	Opens a Word document displaying the information on the Listing Page

Additional Feature Buttons

Each page within the RI ATR application offers additional help to the user. Click on one of the icons to receive the help needed.

Print	Prints the information currently on the form.
Help	Provides user manual help specific to the submenu topic. Includes step by step instructions for adding, editing and deleting.
Info	Provides information on the topic with regards to treatment.
Need Help?	The Chat feature enables users to get immediate assistance from the Customer Support department.

Below are some additional buttons that may appear within a form.

Submit	Forwards the approved information to the appropriate parties for further consideration.
Export	Downloads the selected file into the desired format.
Select	Opens the information in the enter/edit form for viewing or modifications

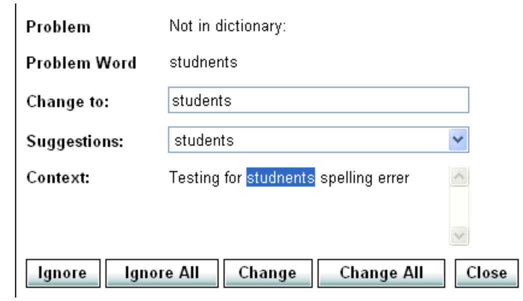
Tips

- Once you have clicked on the Chat Button, a window will ask you to run LogMeInRescue. You will need to install this in order to connect with Support. This is free.

Check Spelling

A Spell Check feature helps eliminate spelling errors. The Spell Check feature will look at any words written within a text box or field and give alternative spelling options to choose from.

When the (**Check Spelling**) button has been selected, a new window opens displaying the Check Spelling Page.



(This is a sample screenshot of the Check Spelling page.)

Option	Description
Change to: student	When the Change (**Change**) button is clicked, the value in the **Change to** box will replace the highlighted misspelled word and the Spell Checker will continue to the next word. You may type in this field if an appropriate suggestion is not present in the **Suggestions** dropdown.
Suggestions: student	A dropdown list of spelling suggestions for the misspelled word. If the word is misspelled but not available as an option in the **Suggestions** dropdown, you may type the correct spelling in the **Change to** box.
Ignore	Disregards the misspelling in the highlighted word only and continues to the next word. The next occurrence of the misspelled word will be highlighted for correction.
Ignore All	Disregards the misspelling in the highlighted word and all future occurrences of the word. You will no longer be prompted to fix the spelling. An example when to use this is if your name was highlighted as misspelled.
Change	Changes the spelling of the highlighted word to the selected **Change to** word.
Change All	Changes the spelling of the highlighted word to the selected **Change to** word and all other occurrences of the word.
Close	Closes the Check Spelling window.

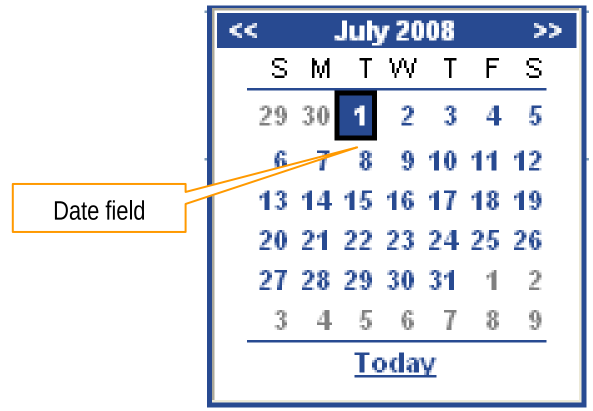
Calendar

Dates can be entered in two different ways: 1) typing the date directly into the field or 2) using the (Calendar) icon. The (Calendar) icon can be used as an alternative option to entering a date directly into a date field.

1. Click the (Calendar) icon. A calendar displaying the current month and year will display below the date field.
2. The calendar will change depending on the selections chosen from the two dropdown lists.
    a. Select the appropriate month from the first dropdown list.
    b. Select the appropriate year from the second dropdown list.
3. Select the date by clicking on a number within the calendar.
4. The calendar will close and the date will appear within the date field.

*Note: You can also change the month by clicking the < > arrows to the right and left of the Month/Year. Clicking the < arrow will take you to the previous month whereas clicking the > arrow will take you to the next month.

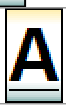
For instance, the current month displaying is July. Clicking the < arrow will take you to June whereas clicking the > arrow will take you to August.



(This is a screenshot displaying the calendar feature.)

Using the Text Resizer

You can alter the size of the text on a form by using the Text Resizer . Clicking on one of the s changes the text size from smallest to largest. Place the mouse pointer over one of the s and left click to change the size.

	Provides the smallest text size
	Provides the default text size
	Provides a medium text size
	Provides the largest text size

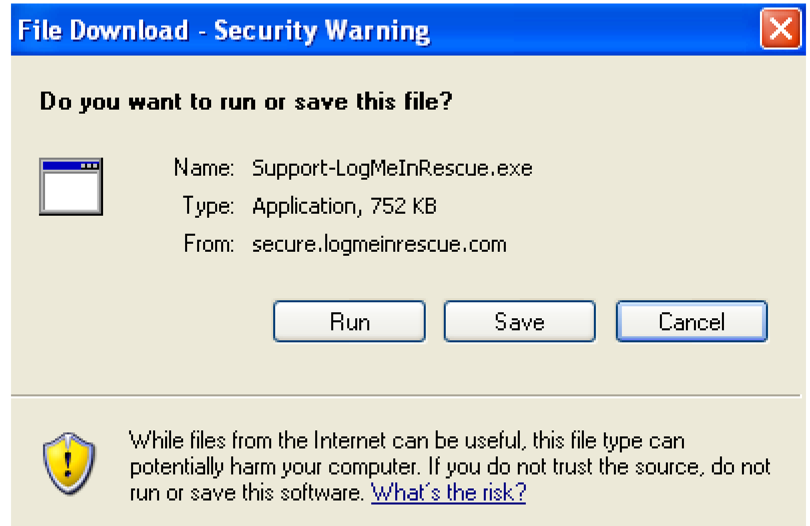
1. Click the  (**Text Resizer**) icon.
2. Select the **Text Size** by selecting the  symbol that is the desired size.

Chat Feature

The Chat feature enables users to get immediate assistance from the Customer Support department.

When the 

(**Chat**) button has been selected, a new window opens prompting you to run the LogMeInRescue application. You must run the application in order to utilize the Chat feature.



(This is a sample screenshot of the Run the LogMeInRescue message.)

LOGIN PROCEDURE

Connect to the Internet using an Internet browser. In the Address field, type in the following address and press enter:

Live Data: https://kitservices2.kithost.net/riatr/

Demo Data: http://demo.kithost.net/RIATR/

1. Type the login name provided by your acting administrator in the **User ID*** field.
2. Type the password in the **Password*** field.
3. Type the provider number in the **Provider ID*** field.
4. Click the Login (**Login**) button.

To log out of the application, click the [Log Off] (**Log Off**) link in the upper right hand corner.

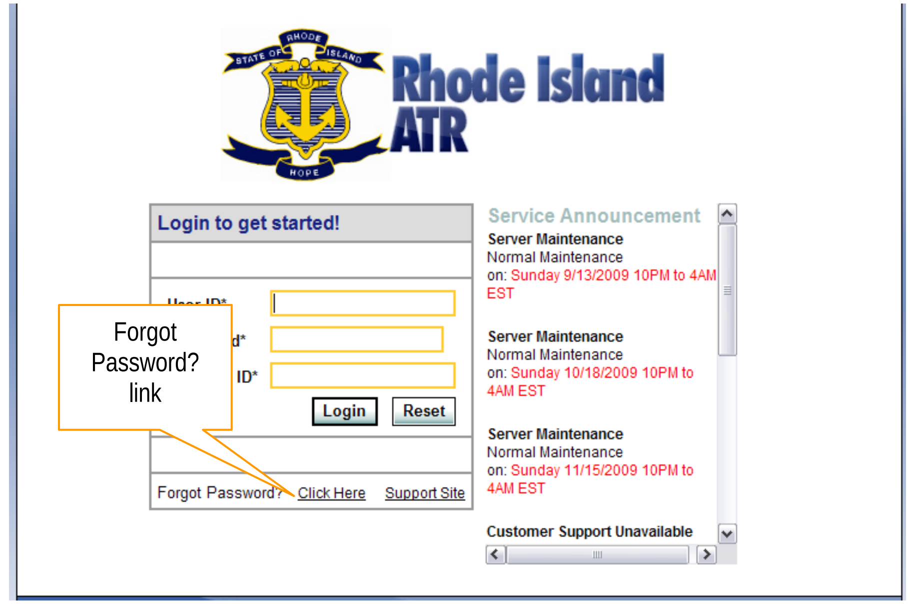
(Login Screen)

Tips

- The **User ID*** IS NOT case sensitive.
- The **Password*** IS case sensitive.
- If you entered the incorrect login information, click the Reset (**Reset**) button to reset the login fields.
- To get to the ATR Support Site, click **Support Site** link. A new window will open displaying the Support Site. (See the KIT Support section for additional details).
- Once a client reaches 135 days and the Follow-Up GPRA has not been completed, you will receive a message that informs you of the lateness of the survey upon logging into the application. You can click the Show Report (**Show Report**) button to review the information or to close the window click Exit link in bottom right corner of message or click the X (X) in the upper right hand corner of the message.

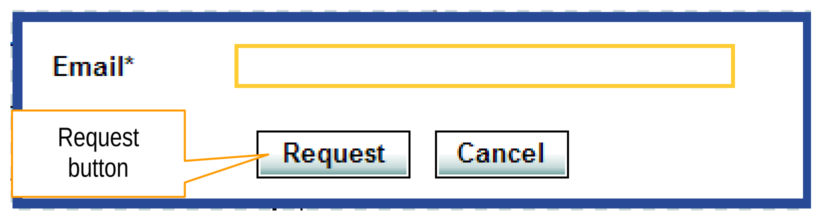
Forgot Password?

If you are unable to log into the RI ATR application due to forgetting your User ID or Password, you can retrieve this information by clicking the link (entitled <u>Click Here)</u> next to Forgot Password?



1. Type the login name provided by your acting administrator in the **User ID*** field.
2. Click the Request (**Request**) button.

You will receive a reply with your login information as long as the email address entered matches the address provided in the Manage Staff module.



(Forgot Password? Screen)

HOME

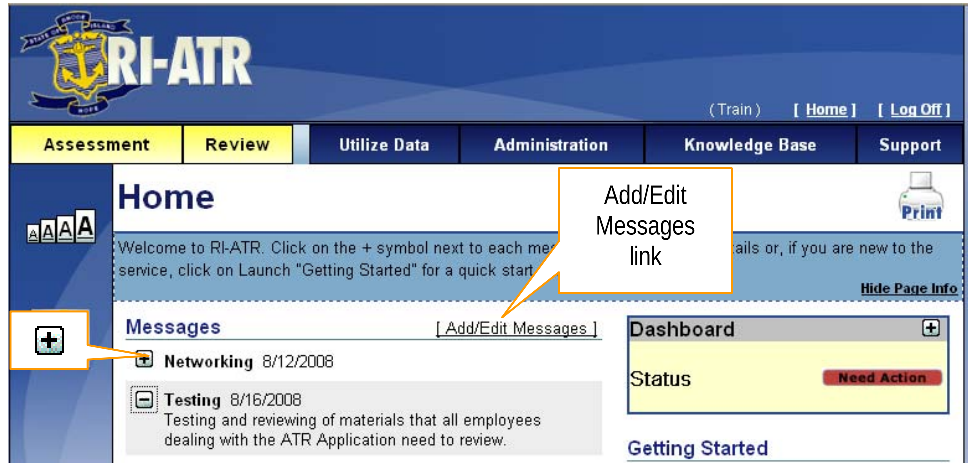
The Home Page provides the organization with important messages, upcoming events and links to News regarding treatment.

Messages

There are two ways to add/edit messages within the application. You can add/edit a message by clicking on the **Add/Edit Messages** link on the Home Page or by using the **Message Board** link on the Administration Landing Page.

- Click the <u>Add/Edit Messages</u> link.
- Click Add (**Add**) button.

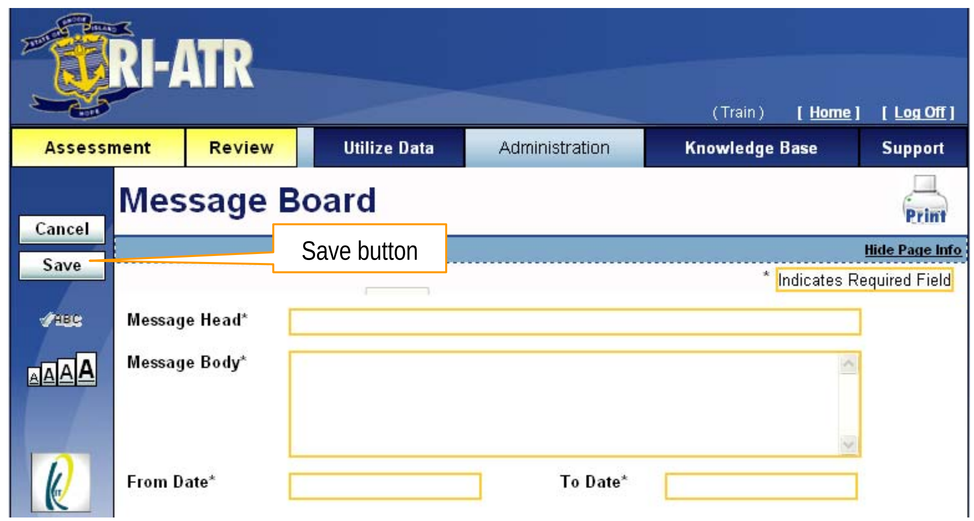
*Note: To view a Message description click on the ⊞ (**plus sign**) next to the Message title. The ⊞ (**plus sign**) will become a ⊟ (**minus sign**). To close the description click on the ⊟ (**minus sign**).



(This is a sample screenshot of the Home Page displaying an open message.)

- Enter a message title in the **Message Head*** field.
- Enter a description in the **Message Body*** field.
- Enter a beginning and ending date in the **From Date*** and **To Date*** fields in the mm/dd/yyyy format.
- Click the Save (**Save**) button on the left toolbar.

  *Note: To exit the screen without saving any details, click the Cancel (**Cancel**) button.



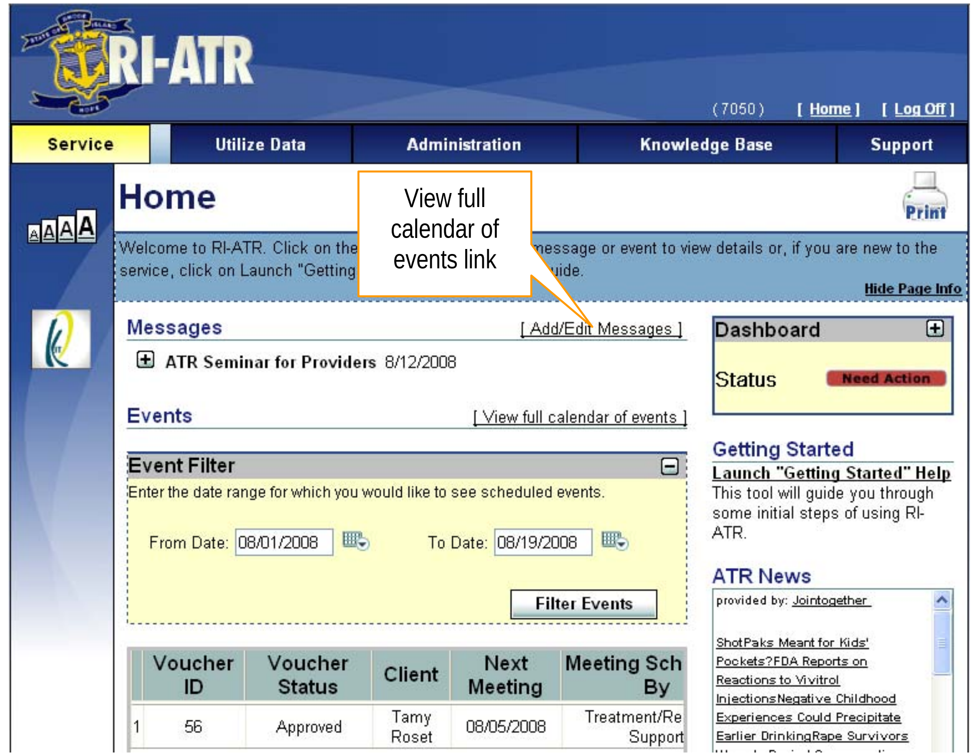
(This is a screenshot of the Message Board Listing Page.)

Events

The events are the next meetings or sessions that are entered within the Service Plan.

- The (**Filter Events**) feature allows the provider to display only the specific meetings and sessions for clients that fall into the desired date range using either the **From Date** and **To Date** fields or using the calendar.
  *Note: See Services page for additional information.
- Click on the link entitled <u>View full calendar of events</u> to see a full month's display of Events.

*Note: To expand the Events grid click on the (**plus sign**) in the right corner of the Event Filter box. The (**plus sign**) will become a (**minus sign**). To close the description click on the (**minus sign**).

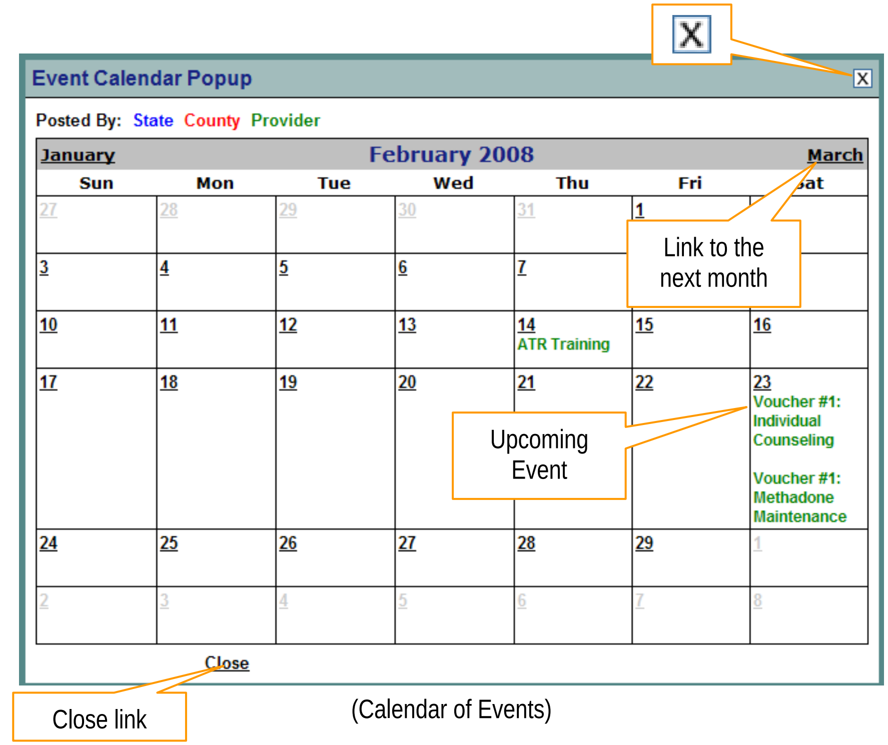


(This is a partial screenshot of the Home Page.)

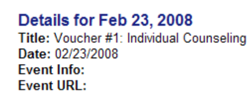
Tips

- If an event is added by the state, then the even will display for all providers, regardless of their permission level.

- A new screen will appear displaying the Calendar.
- To view Event details for a particular day, click on the calendar date (e.g., 23).
- Switch to the previous or next month by selecting the link located to the right or left of the month's name.
- To close the calendar, click on the X (X) in the upper right hand corner or click the Close (Close) link.



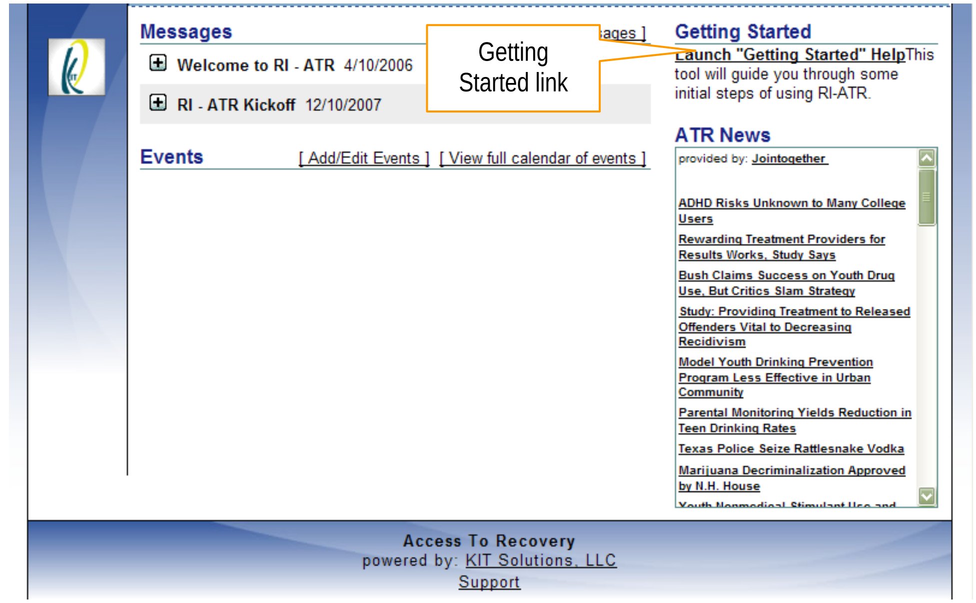
(Calendar of Events)



(Event details)

Getting Started

- To view a guide through the initial steps of using the RI-ATR application, click on the Launch "Getting Started" Help link.
- A new window will open displaying some basic information about the RI ATR application.
- To close the window, click on the X (X) in the upper right hand corner or click the Close (Close) link.



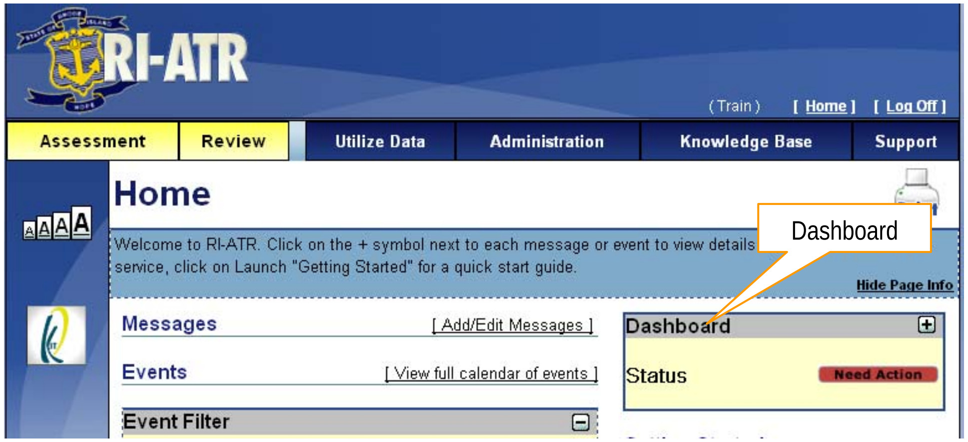
ATR News

- To view a News article, click on the title of the article from the ATR News section. ATR News section is automatically updated in 'real-time' by JoinTogether.
- A new window will open when you click on the specified news article link.
- To close the window, click on the X (X) in the upper right hand corner or click the Close (Close) link.

Dashboard

The Dashboard feature on the home page is designed to provide status updates in regards to various timeliness, notifications and inactivity scenarios for reports and surveys within the ATR Application.

*Note: To view a Message or Event description click on the ⊞ (**plus sign**) next to the Message or Event title. The ⊞ (**plus sign**) will become a ⊟ (**minus sign**). To close the description click on the ⊟ (**minus sign**).



(This is a sample screenshot of the Home page displaying the Dashboard.)

Voucher Timeliness

This report shows all vouchers with no services within 20 days of being issued

1. Green=0-19 days
2. Yellow=20-30 days
3. Red=30+ days

GPRA Follow-Up Notification

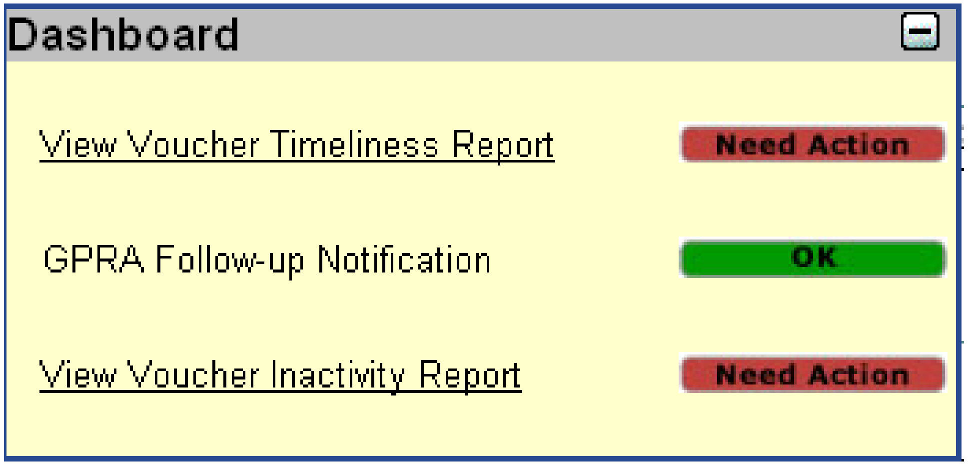
This report shows all vouchers that are 4.5 months (135 days) past voucher issue.

1. Green=0-134 days
2. Yellow=135-180 days
3. Red='181+ days

Voucher Inactivity

This report shows all vouchers that have no services for at least 20 days.

1. Green=0-19 days
2. Yellow=20-30 days
3. Red=30+ days



(This is a sample screenshot of the Dashboard on the Home Page.)

Tips

- Green – No Action Needed
- Yellow – Alert. A link is available for the report or survey that falls within this status.
- Red – Action. A link is available for the report or survey that falls within this status.

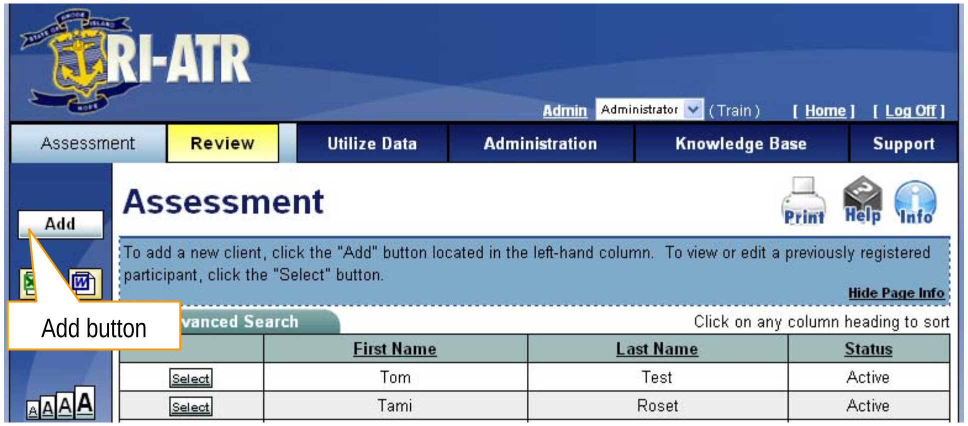
ASSESSMENT

The Assessment module is designed to register and track client information within the application.

Client Information

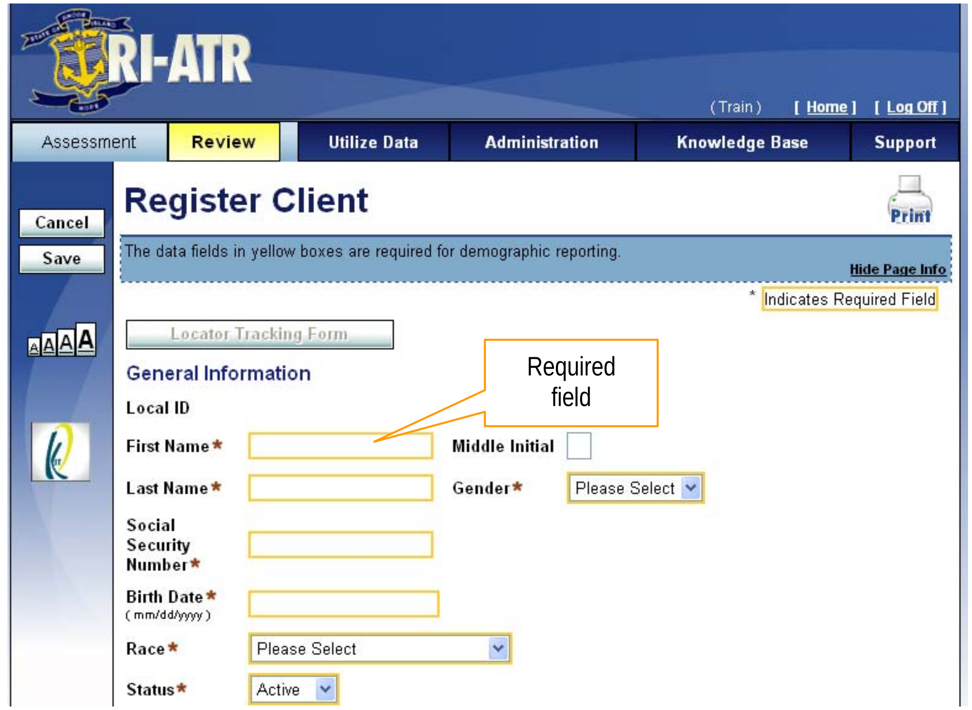
Use the Client Information form to add/edit and delete information for clients within the application

1. Click **Assessment** from the Menu.
2. Click the Add (**Add**) button.



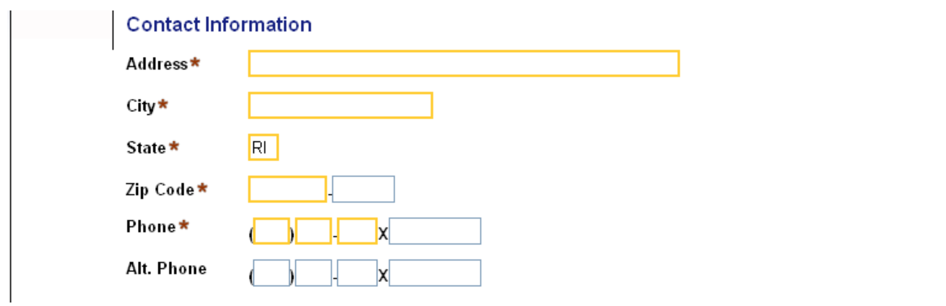
(This is a sample screenshot of the Assessment Listing Page.)

3. Enter the client's **General Information**.
    a. Enter the client's first name in the **First Name*** field.
    b. If desired, enter the client's middle initial in the Middle Initial field.
    c. Enter the client's last name in the **Last Name*** field.
    d. Select the client's **Gender*** using the dropdown list.
    e. Enter the client's social security number in the **Social Security Number*** field.
    f. Enter the client's date of birth in the **Birth Date*** field as mm/dd/yyyy.
    g. Select the client's race from the **Race*** dropdown list.
    h. The **Status*** is defaulted to *Active*.
        i. *Active*: the client is currently receiving treatment (can be viewed on other screens and reports).
        ii. *Inactive*: the client is no longer receiving treatment (will no longer appear on other screens and reports).



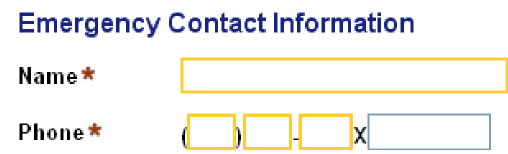
(This is a sample screenshot of the Register Client Listing Page.)

4. Enter the client's **Contact Information**.
    a. Enter the client's address in the **Address*** field.
    b. Enter the client's city in the **City*** field.
    c. The **State*** field is defaulted to RI.
    d. Enter the client's 5 digit zip code in the **Zip Code*** fields.
    Note: Enter the Zip Code extension in the second box for the Zip Code field, only the 5 digits are required.
    e. Enter the clients area code and extension in the **Phone*** field.
    f. If desired, enter and alternative phone number in the Alt. Phone fields.



(This is a partial screenshot of the Register Client Contact Information fields.)

5. Enter the client's **Emergency Contact Information.**
    a. Enter the client's emergency contact name in the **Name*** field.
    b. Enter the client's emergency area code and extension in the **Phone*** field.
6. Click the (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any details, click the (Cancel) button.



(This is a partial screenshot of the Register Client Emergency Contact information fields.)

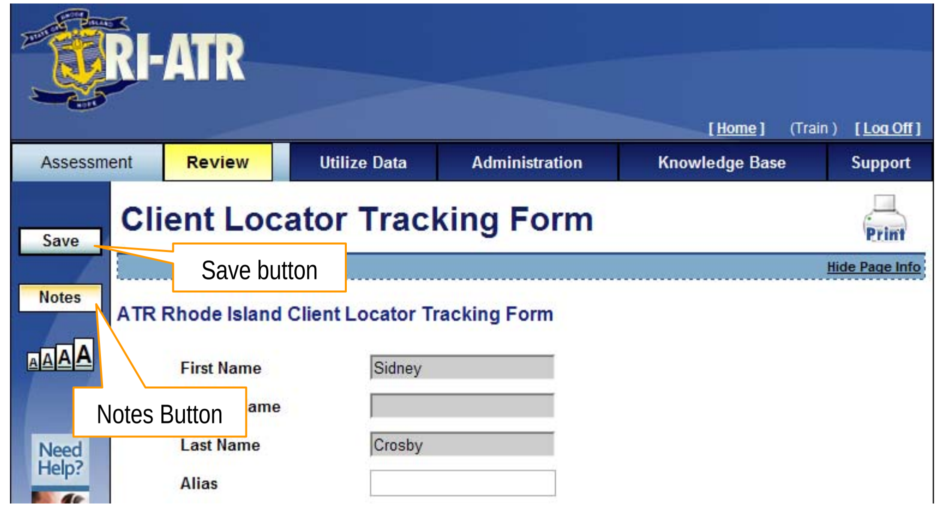
Tips

- When entering a new client if the Social Security Number being entered is already in the system, you will receive an error message: 'To move on with the same Social Security Number' click (**OK**) button within the message and click the (**Save**) button again.
- The Birth Date field can be no more than 100 years old and no younger than 13 years old. If you try to enter a Birth Date not within this range, you will not be able to save the information.
- Upon saving a new client's information, you will receive confirmation that the client was successfully saved. Upon clicking **OK**, you will be directed to the Client Locator Form. All required fields are defaulted from the Client Registration Page, but you MUST click (**Save**) button to exit the screen. Upon clicking Save you will then have the ability to click (**Exit**) button and return to Voucher Information screen

Locator Tracking Form

The Locator Tracking Form is used to gather further information about a client. This form is not required, but highly suggested so the client can be found for their 6 month follow-up.

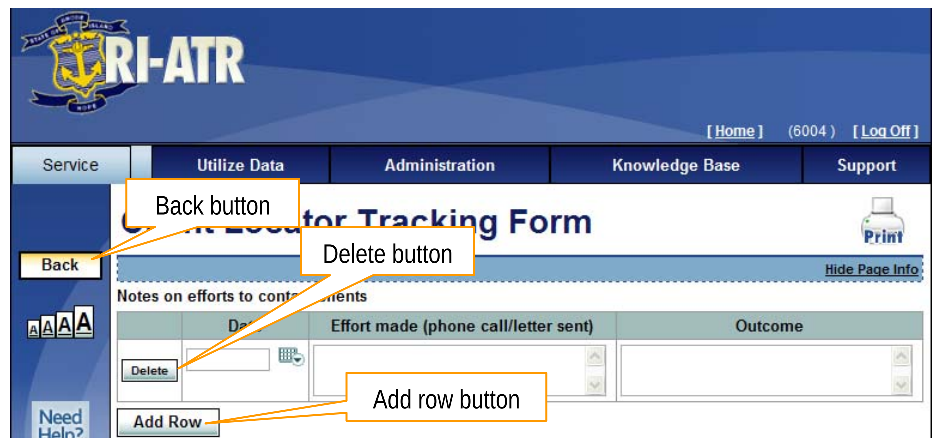
1. After clicking the Save (**Save**) button on the Register Client Screen, you will be immediately be taken to the Client Locator Tracking Form
2. The required fields (i.e. **First Name**, **Last Name**, **Birth Date** and **Social Security Number**) are automatically filled in with the information that was entered in the Register Client screen.
3. Enter in additional information in the optional fields.
4. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
5. Click the Exit (**Exit**) button to be taken to **Voucher Information** for this particular Client.



(This is a sample screenshot of the Locator Tracking Form.)

Tracking Form Notes

1. Click the Notes (**Notes**) button from the left toolbar.
2. Click the Add Row (**Add Row**) button.
3. Enter the **Date*** as mm/dd/yyyy or select the date by clicking on the calendar. (See Calendar section for further details)
4. Enter notes into the **Effort Made** field.
5. Enter notes into the **Outcome** field.
   *Note: The Effort Made and Outcome fields both have a 4000 character limit.
6. To save the note, click the Back (**Back**) button.
7. To remove a record, click the Delete (**Delete**) button.

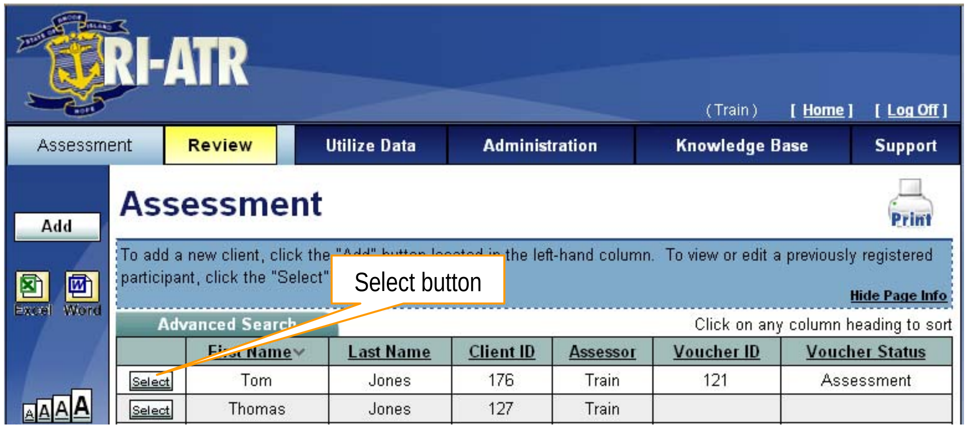


(This is a sample screenshot of the Client Locator Tracking Form notes.)

Voucher Information

The Voucher Information module is designed to enter forms and information related to each client within the application.

1. Click **Assessment** from the Menu.
2. From the Assessment Listing Page, select the client you wish to work with by clicking the Select (**Select**) button to the left of the client's name.



(This is a sample screenshot of the Assessment Listing Page.)

3. The screen is defaulted to open with the (Minus) sign to the left of the Voucher #, which has the Voucher Information expanded.
4. To continue with entering the client's voucher information, you will need to click on the links (e.g. Administer Client GPRA Survey) to enter the necessary client data.

*Note: Click on the (Minus) sign, it becomes a (Plus) sign with the links no longer displaying.
To make the links available click on the (Plus) sign.

(This is a partial screenshot of Voucher Information Listing Page.)

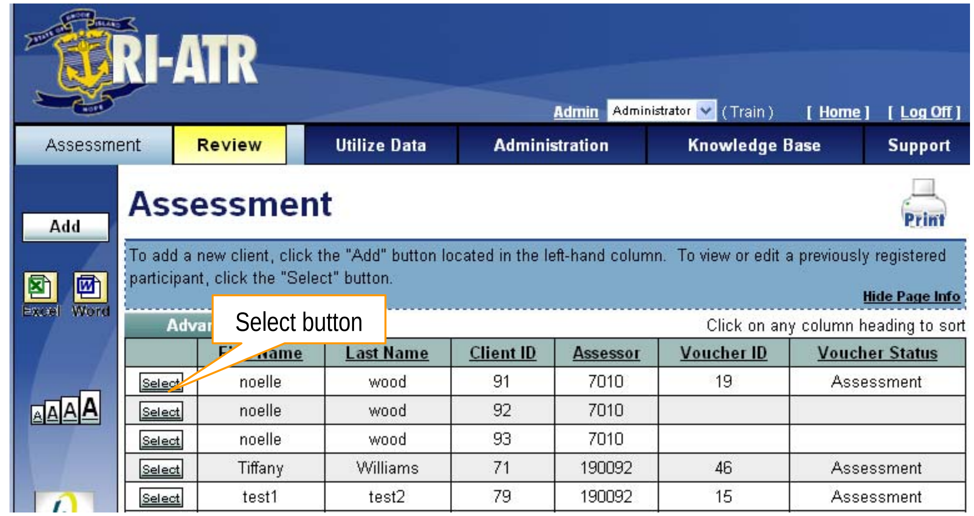
Tips

- The links on the Voucher Information page (e.g. Administer Client GPRA Survey, Upload Assessment Tool/Picture) are linked to the client.
- If you have a pop-up blocker on your computer, hold the ctrl key down while selecting any button used to view the format (e.g., Choice Forms, PDF, etc.).

Editing Client Information

1. Click **Assessment** from the Menu.
2. From the Listing Page, select the client you wish to edit by clicking the Select (**Select**) button to the left of the client's name.
3. Click on the View/Edit Client Profile (**View/Edit Client Profile**) button to continue to the client information screen.

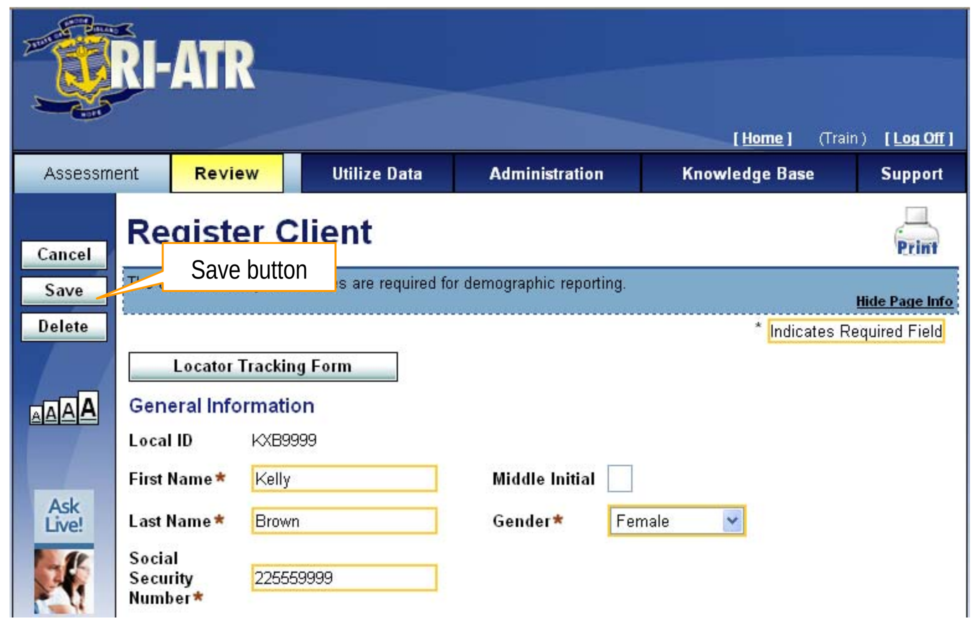
   *Note: To exit the screen without saving any changes, click the Exit (**Exit**) button.



(This is a sample screenshot of the Assessment Listing Page.)

4. The client will appear in the edit mode.
5. Make any changes needed to the details.
6. Click the Save (**Save**) button from the left toolbar.

   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.

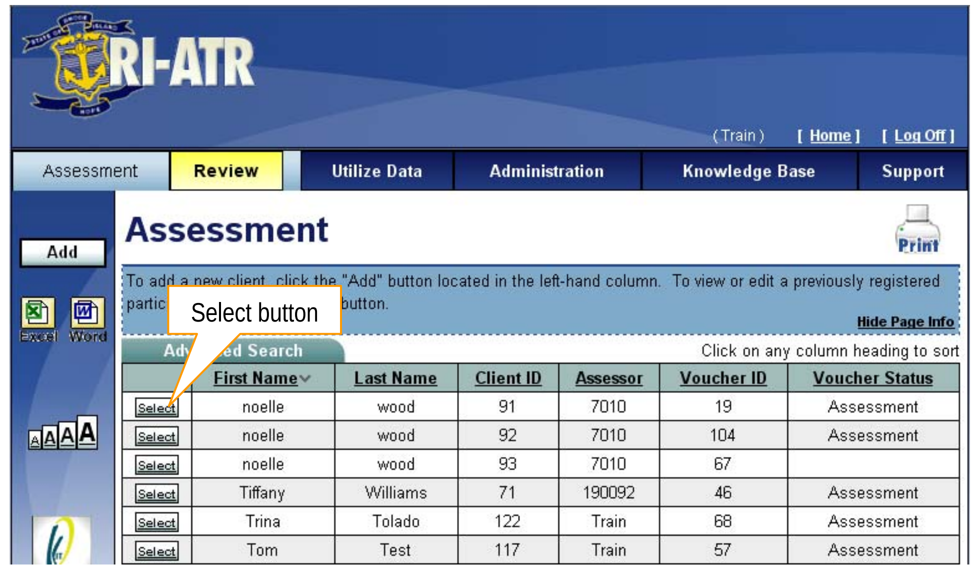


(This is a sample screenshot of the Client Page.)

Deleting Client Information

1. Click **Assessment** from the Menu.
2. From the Listing Page, select the client you wish to delete by clicking the Select (**Select**) button to the left of the client's name.
3. Click on the View/Edit Client Profile (**View/Edit Client Profile**) button to continue to the client information screen.

   *Note: To exit the screen without saving any changes, click the Exit (Exit) button.



(This is a sample screenshot of the Assessment Listing Page.)

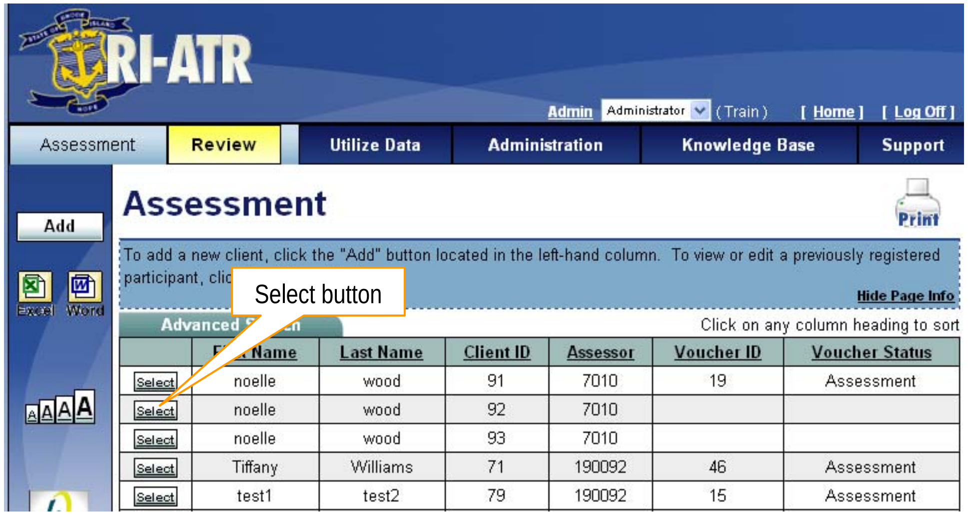
4. The client will appear in the edit mode.
5. Click the Delete (**Delete**) button from the left toolbar.
   *Note: To cancel the deletion, click the Cancel (**Cancel**) button.

(This is a sample screenshot of the Client Page.)

Administer Client GPRA Surveys

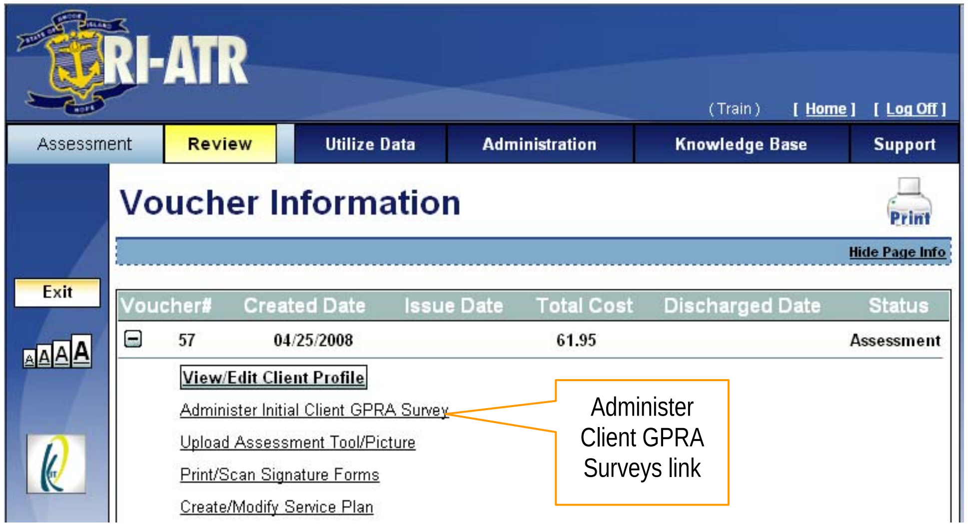
The Administer Client GPRA Surveys is used to gather further information about a client.

1. Click **Assessment** from the Menu.
2. From the Listing Page, select the client you wish to enter additional information for by clicking the Select (**Select**) button to the left of the client's name.

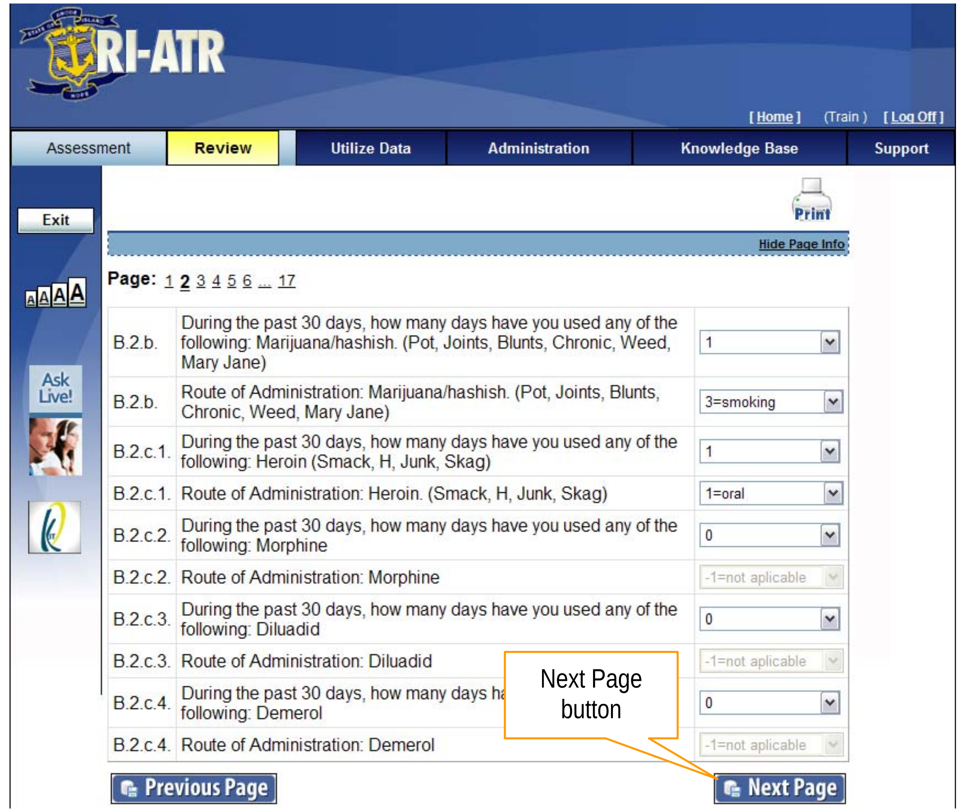


(This is a sample screenshot of the Assessment Listing Page.)

3. Click Administer Client GPRA Survey link.



(This is a sample screenshot of the Voucher Information Listing Page.)



(This is a sample screenshot of the GPRA Surveys.)

4. Answer questions using the drop down list to the left of the question.
5. Click the Next Page (Next Page) button to continue to the next page of questions or click the Previous Page (Previous Page) button to return to return. (See table).
6. Continue in this manner until all the pages have been filled in.
7. Once you have answered all the questions, click the Exit (Exit) button on the last page.

Below are the buttons that allow you to move within the GPRA Surveys.

Next Page	This button moves you to the page directly after the one currently on
Previous Page	This button moves you to the page directly prior to the one currently on.

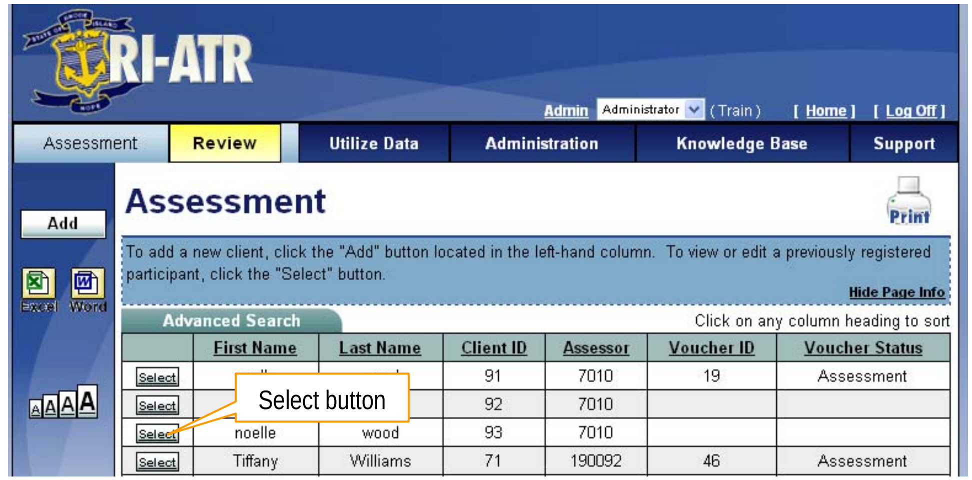
Tip

- Clicking on the Next Page (Next Page) button will automatically save the current page.

Upload Assessment Tool/Picture

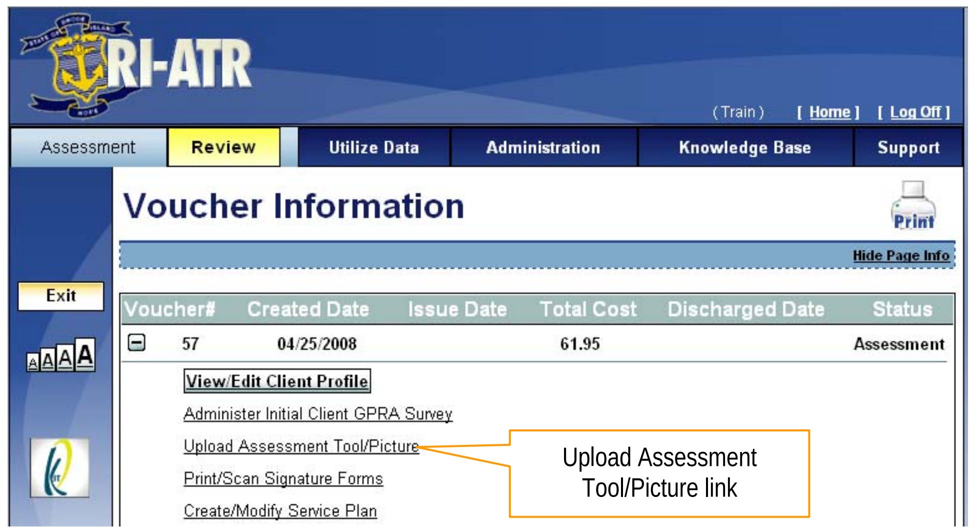
The Upload Assessment Tool is an instrument designed to be administered as a semi-structured interview in a short time frame to patients who present for substance abuse treatment and the picture is a photo of the client to ensure proper identification.

1. Click **Assessment** from the Menu.
2. From the Voucher Information Listing Page, select the client you wish to enter additional information for by clicking the Select (**Select**) button to the left of the client's name.



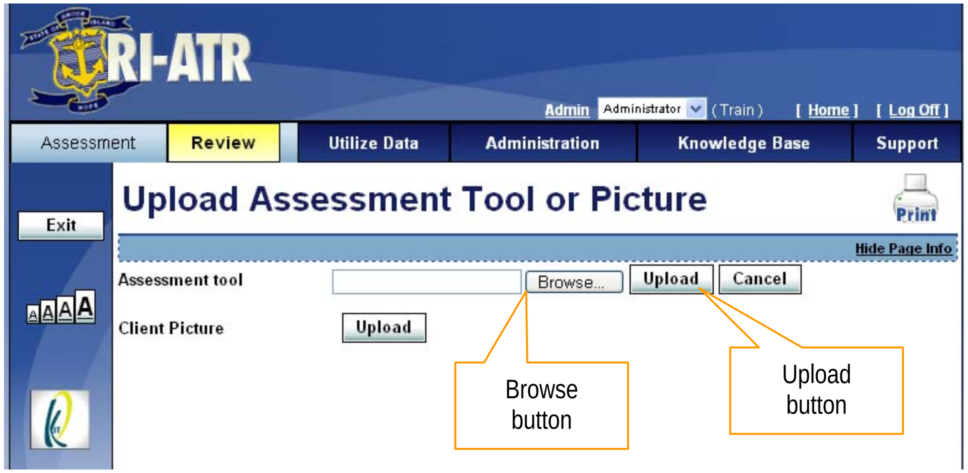
(This is a sample screenshot of the Assessment Listing Page.)

3. Click on the <u>Upload Assessment Tool/Picture</u> link.



(This is a sample screenshot of the Voucher Information Listing Page.)

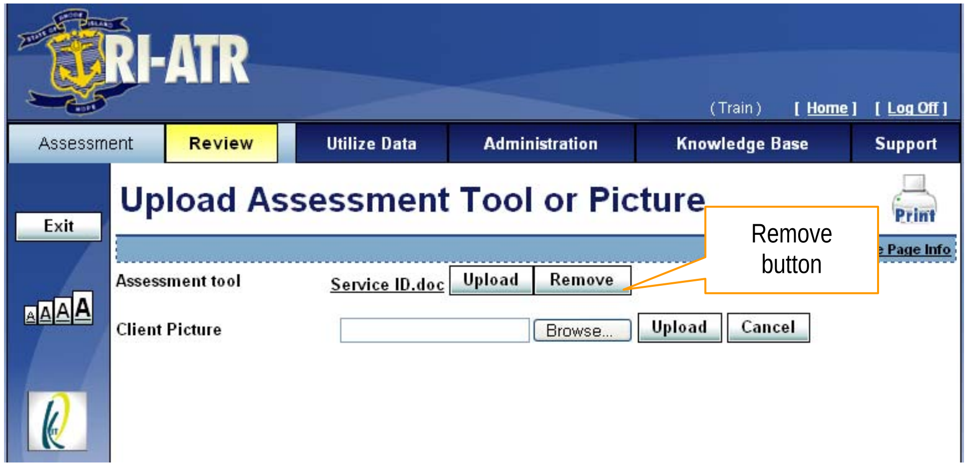
4. To upload the Assessment Tool, click the Upload (**Upload**) button.
5. Once you click the Upload button, click Browse... (**Browse**) button which allows you to browse your computer.
    a. After clicking the Browse... (**Browse**) button File management opens on your computer, displaying your files. You can double click on the appropriate file or click once then click the open button.
6. Once you have located the tool, click the Upload (**Upload**) button.



(This is a screenshot of the Upload Assessment Tool/Picture Page.)

7. Click on the Upload Assessment Tool/Picture link.
8. To collect the client picture, click the Upload (**Upload**) button
9. Click Browse... (**Browse**) button, to locate the photo.
10. Once you have located the photo, click the **Upload** button.

*Note: To remove a previously uploaded form or picture, click the Remove (Remove) button.



(This is a screenshot of the Upload Assessment Tool/Picture Page.)

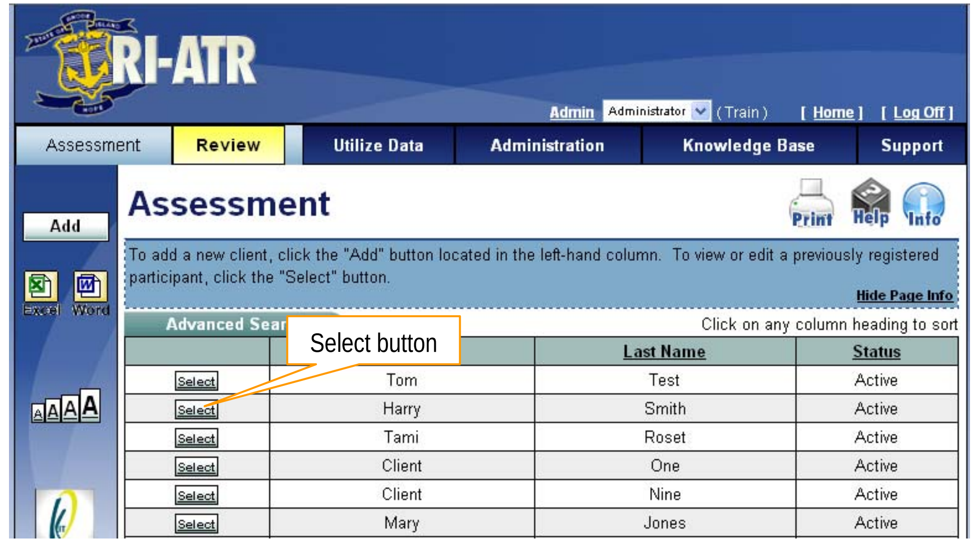
Tips

- The types of files that can be uploaded into the ATR Application are: Word (.doc), Adobe (.PDF), Text (.text), Pictures (.jpg, .tif and .gif).
- Word 2007 files can not be uploaded. They create .docx file types.
- When uploading a Client Picture, ensure that the file size is smaller than 20 MB.

Print/Scan Signature Forms

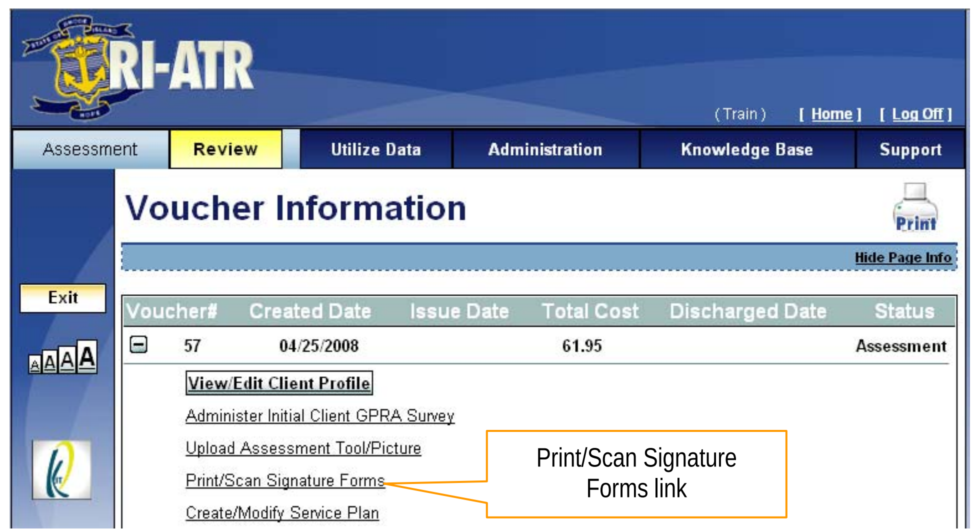
The Print/Scan Signature Forms are the Choice and Confidential Release Forms which grant permission to client information.

1. Click **Assessment** from the Menu.
2. From the Voucher Information Listing Page, select the client you wish to enter additional information for by clicking the Select (**Select**) button to the left of the client's name.



(This is a sample screenshot of the Assessment Listing Page.)

3. Click <u>Print/Scan Signature Forms</u> link.

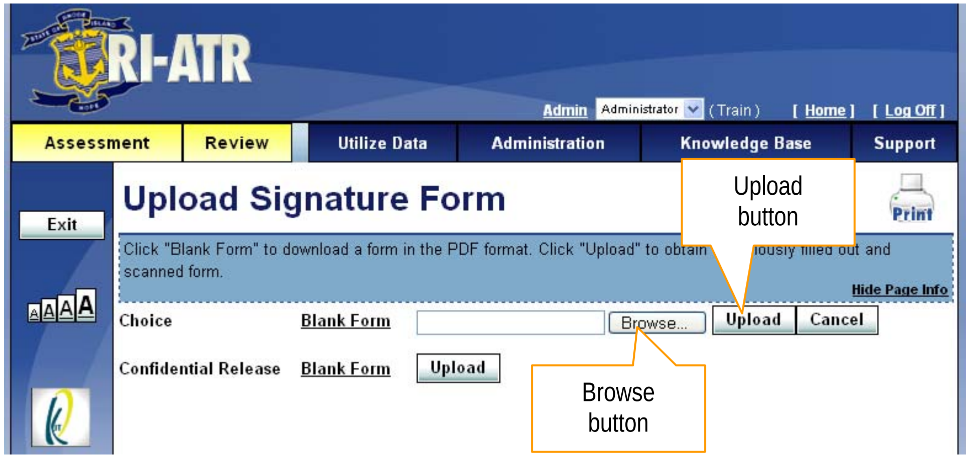


(This is a sample screenshot of the Voucher Information Listing Page.)

4. To download a blank Choice Form, click on the Blank Form link.
5. A new window will open in a PDF File format.
   a. Click the (Save) button to save a copy to your computer. This must be done in order to use the digital signature.
   b. To digitally sign the form, click on the Sign (Sign) button in the Adobe Reader submenu.
   c. Click Place Signature... (Place Signature) and you will need to drag your mouse to draw the area where signature needs to appear.
   d. A new window will open and ask you to type in a password and to select the Appearance of the signature using radio buttons.
   e. Click the Sign button.
6. Once you have signed and dated the form in the designated areas, save the form.
7. To close the window, click the (X) in the upper right corner.

(This is a partial screenshot of the Upload Signature Form Page.)

8. To upload the signed Choice Form, click the Upload (Upload) button.
9. Once you click the Upload button, click Browse... (Browse) button which allows you to browse your computer.
   a. After clicking the Browse... (Browse) button File management opens on your computer, displaying your files. You can double click on the appropriate file or click once then click the open button.
10. Once you have located the tool, click the Upload (Upload) button.



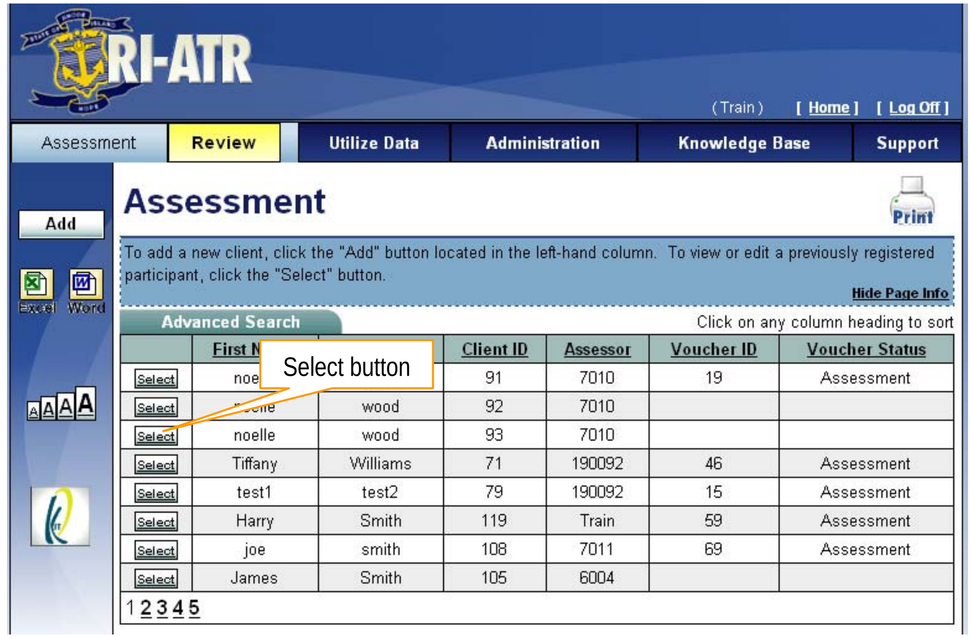
(This is a screenshot of the Upload Signature Form Page.)

Tips

- If you have a pop-up blocker on your computer, hold the ctrl key down while selecting any button used to view the forms (e.g., Confidential Release Forms, PDF, etc.).

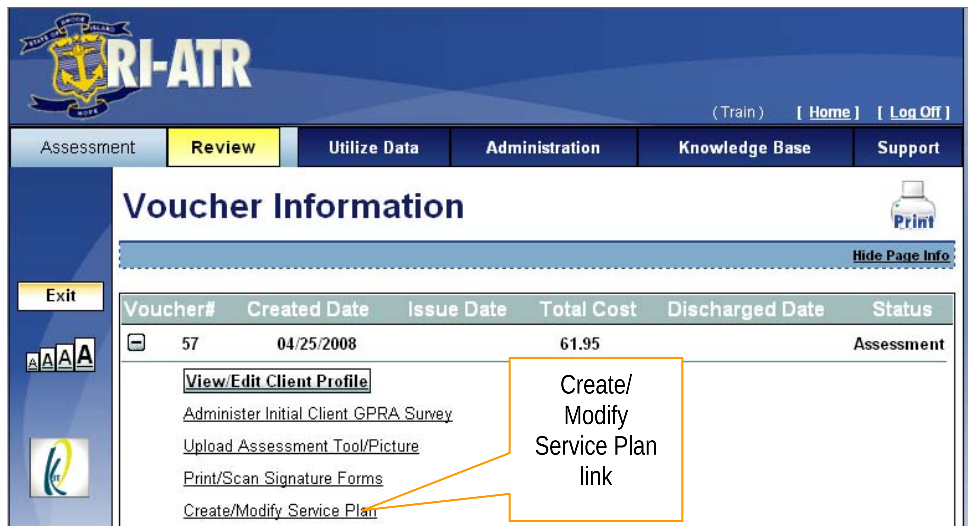
Create/Modify Service Plan

1. Click **Assessment** from the Menu.
2. From the Service Plan Listing Page, select the client you wish to edit by clicking the Select (**Select**) button to the left of the client's name.



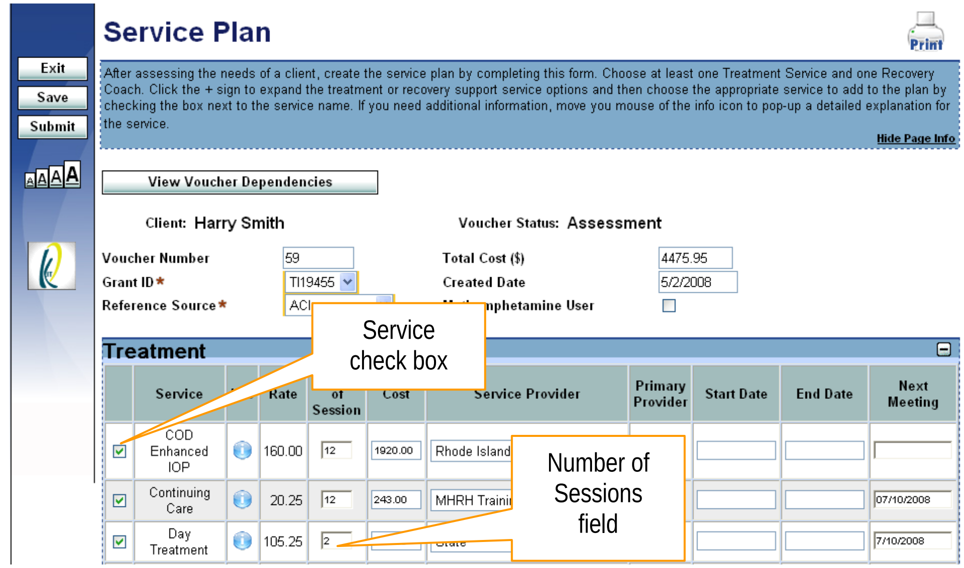
(This is a sample screenshot of the Assessment Listing Page.)

3. Click Create/Modify Service Plan link.

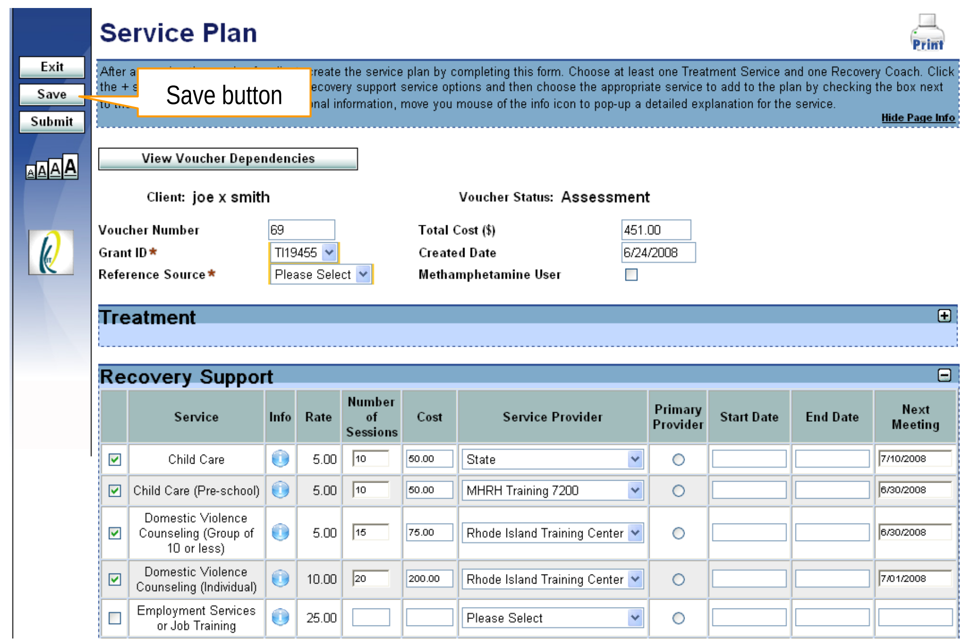


(This is a sample screenshot of the Voucher Information Listing Page.)

4. Click on the ⊞ (**Plus**) sign to the right of the Treatment.
5. Fill the treatment service information in that is specific to the client.
   a. Check the box to the left of the **Service**.
   b. Enter in the **Number of Sessions** (the cost will automatically populate).
   c. Select the **Service Provider** from the drop down list.
   d. If **Primary Provider**, select the radio button.
   e. Enter the **Start Date** and **End Date**.
   f. Enter the **Next Meeting** date.



(This is a sample screenshot of the Service Plan Page.)



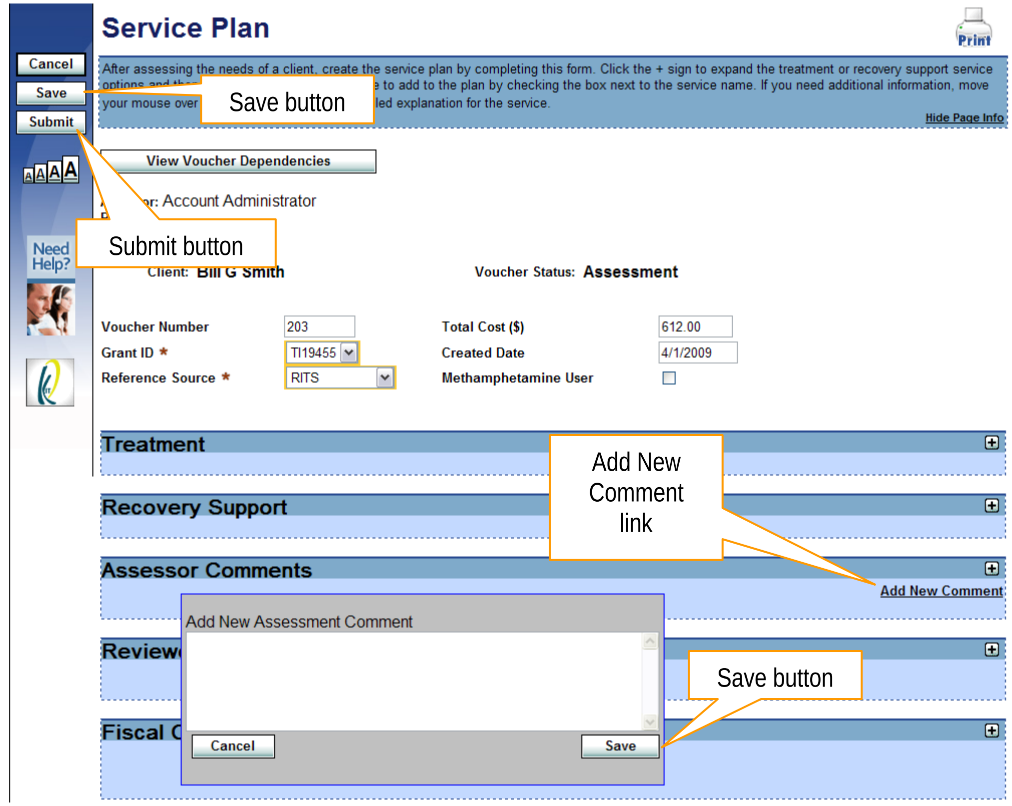
6. Click on the ⊞ (**Plus**) sign to the right of the Recovery Support.
7. Fill the treatment service information in that is specific to the client.
   a. Check the box to the left of the **Service**.
   b. Enter in the **Number of Sessions** (the cost will automatically populate).
   c. If **Primary Provider**, select the radio button.
   d. Enter the **Start Date** and **End Date**.
   e. Enter the **Next Meeting** date.
8. Click the Save (**Save**) button from the left toolbar to save the Service Plan

(This is a partial screenshot of the Service Plan Page.)

9. Click on the ⊞ (Plus) sign to the right of the Comments to see previously entered notes.
10. If desired, click the <u>Add New Comment</u> link under the Comments area
11. Enter your comments.

    *Note: There is an 8000 character limit on this filed.
12. Click the [Save] (Save) button inside the Comment box.

    *Note: To exit the screen without saving any changes, click the [Cancel] (Cancel) button
13. If you are ready to submit the Service Plan for review, click the [Submit] (Submit) button.
14. Click the [OK] (OK) button. If there are errors you will need to click the [View Voucher Dependencies] (View Voucher Dependencies) button.



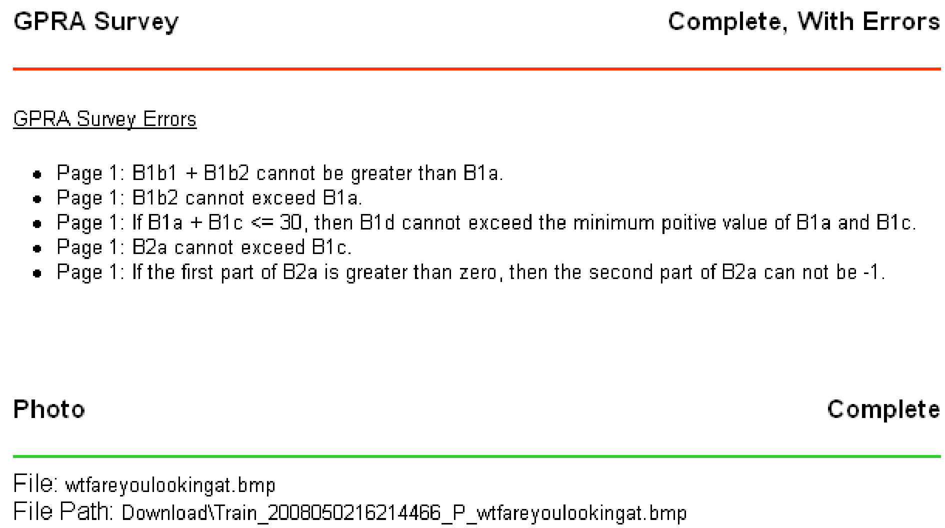
Tips

- The Reference Source 'Other' has been added to the drop down list. If 'Other' is selected, then you must specify the other Reference Source in the textbox.
- If a client has been inactive for 6 months after the First Issue date (no services have been entered) then their status on the Client Registration page will be updated to Inactive. If an attempt is made to edit the status then they will receive the following message: "This client has been inactive for 6 or more months; therefore funded ATR services can no longer be received."

View Voucher Dependencies

The **View Voucher Dependencies** is a validation tool used within the application to ensure that all the required parts are fulfilled when entering a client's information into the **Service Plan**. You are able to save the **Service Plan** if there are validation errors, but you will not be able to submit the **Service Plan** if there are errors.

1. If your **Service Plan** has errors, when you click the (**Submit**) button you will receive an error message.
2. The (**View Voucher Dependencies**) button enforces validation errors when creating the **Service Plan**.
3. A new window will open displaying the various parts entered into the **Service Plan**.
4. To close the new website window, click on the (X) in the upper right hand corner.
5. Once you have corrected the errors, you will be able to submit the Service Plan.



(This is a sample screenshot of the Voucher Dependencies form.)

Tips

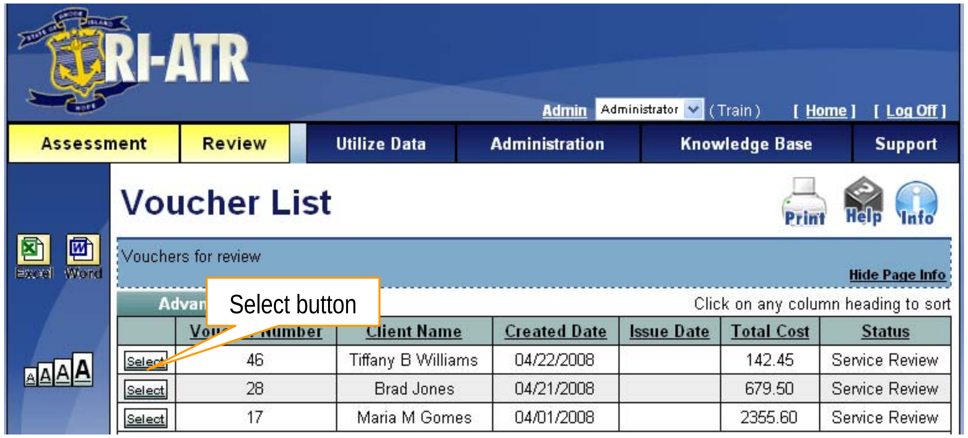
- You are required to have a Primary Provider selected within the application.

REVIEW

The Review module is designed to view voucher information as well as displaying the service plan details for submission within the application. This module is for the staff members who have the Reviewer Permission level.

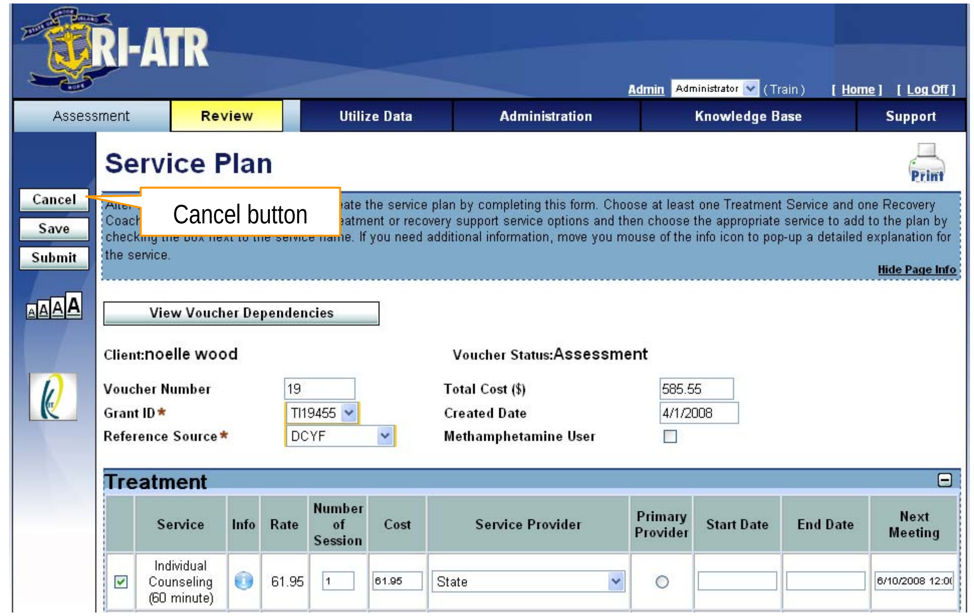
(***Note**: For a description of the levels, see the Permission Default list.)

1. Select **Review** from the Menu.
2. From the Listing Page, select the client you wish to review by clicking the Select (**Select**) button to the left of the Voucher Number.
3. The client's service plan information will display.



(This is a sample screenshot of the Voucher Listing Page.)

4. Review and update the treatment sessions and recovery support sections.
5. Click the Submit (**Submit**) button.
6. Click the Cancel (**Cancel**) button which will return you the Voucher Information Landing Page.

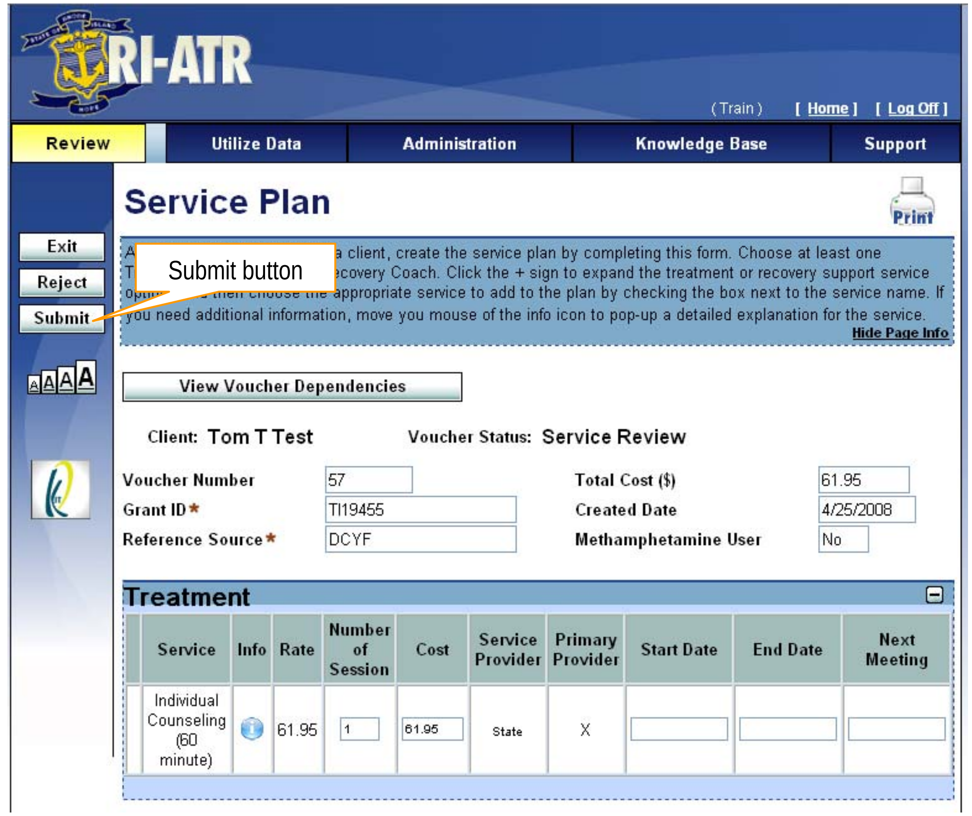


(This is a sample screenshot of the Service Plan Page.)

Reviewer

If you are a reviewer, follow these steps.

1. Select **Review** from the Menu.
2. From the Listing Page, select the client you wish to review by clicking the Select (**Select**) button to the left of the Voucher Number.
3. The client's service plan information will display.
4. Review the Treatment and Recovery Support sections of the Service Plan.



(This is a sample screenshot of the Service Plan Page.)

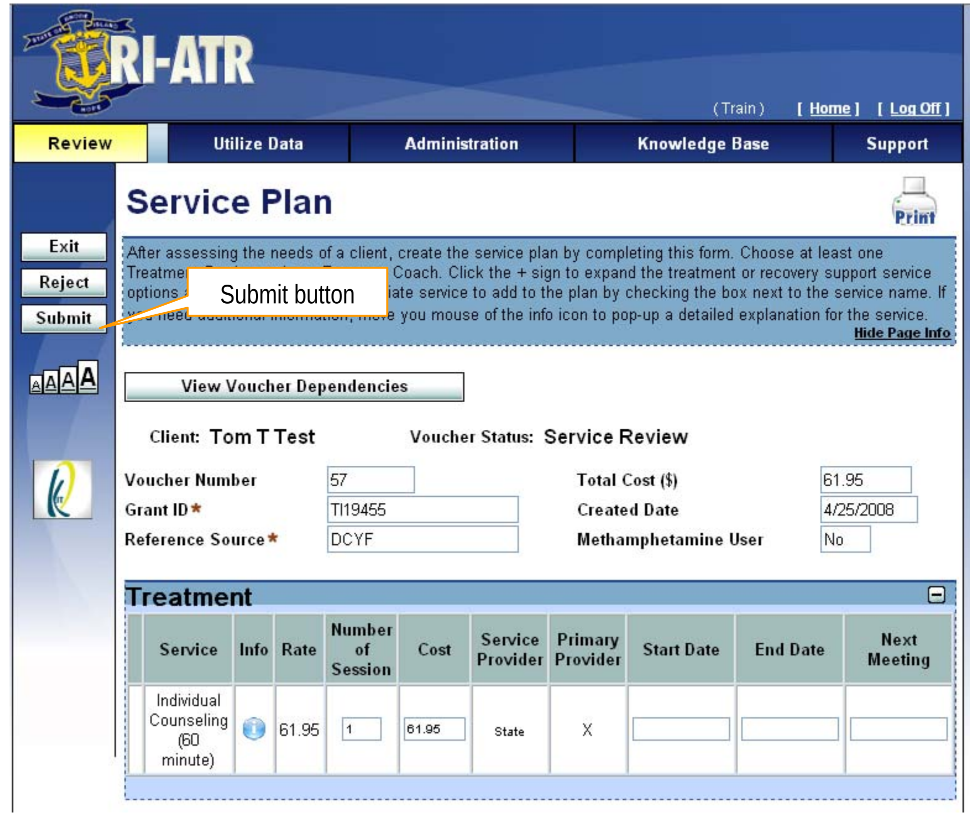
5. Click the <u>Add New Comment</u> link to enter any comments about the Service Plan.
6. A new window will open to add the comments, click the (**Save**) button when completed with comment.
7. At this point you can either submit or reject the Service Plan.
8. Once you click the (**Submit**) button, the Service Plan is forwarded to the Fiscal Reviewer.
9. If you click the (**Reject**) button, the Service Plan is forwarded back to the Assessor for modifications.

(This is a sample screenshot displaying the Comment section of the Service Plan Page.)

Fiscal

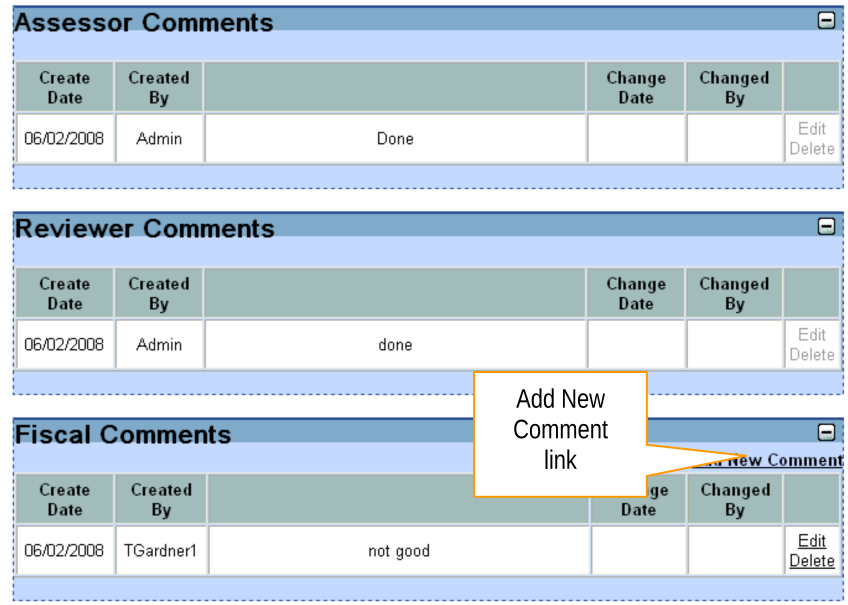
If you are a fiscal reviewer, follow these steps.

1. Select **Review** from the Menu.
2. From the Listing Page, select the client you wish to review by clicking the Select (**Select**) button to the left of the Voucher Number.
3. The client's service plan information will display.
4. Review the Treatment and Recovery Support sections of the Service Plan.



(This is a sample screenshot of the Service Plan Page.)

5. Click the <u>Add New Comment</u> link to enter any comments about the Service Plan.
6. A new window will open to add the comments, click the (**Save**) button when completed with comment.
7. At this point you can either submit or reject the Service Plan.
    a. Once you click the (**Submit**) button, the Services are open for the Provider.
    b. If you click (**Reject**) button, the Service Plan is forwarded back to the Assessor for modifications.



(This is a sample screenshot displaying the Comment section of the Service Plan Page.)

UTILIZE DATA

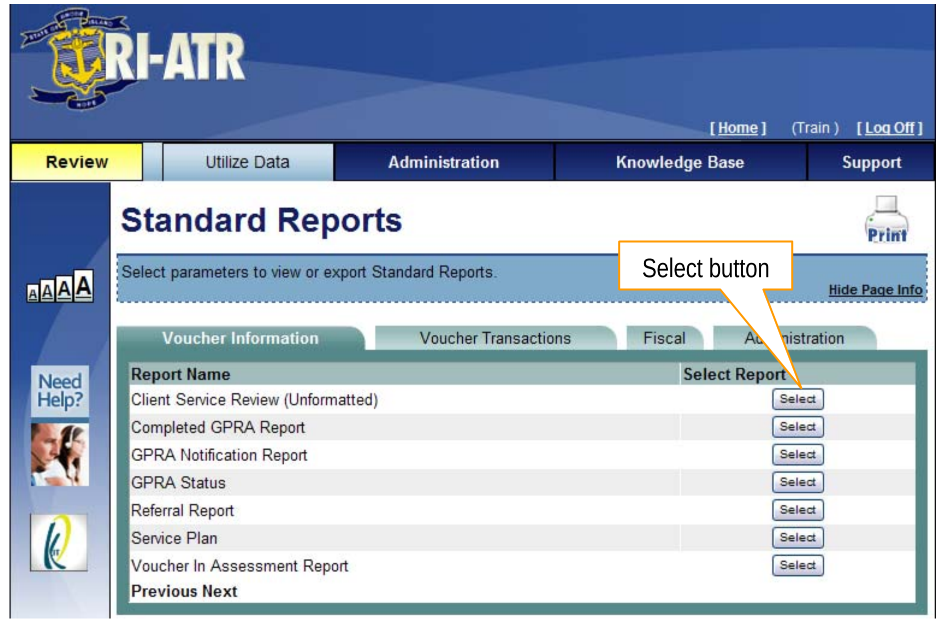
The Utilize Data module is designed to generate reports to assist with tracking, monitoring and assessing voucher information.

Standard Reports

The Standard Reports module enables you to have the ability to get specific voucher, fiscal and administration information through reports.

To select a Standard Report

1. Click **Utilize Data** from the Menu.
2. Click **Standard Reports** from the Utilize Data Landing Page.
3. Select the type of report you wish to view/print from the tabs (i.e.
4. Select the report you wish to view/print by clicking the (**Select**) button.
5. Click the (**Show Report**) button to bring up a new window with the report
6. A new window will open, to close the window, click on the (X) in the upper right corner.



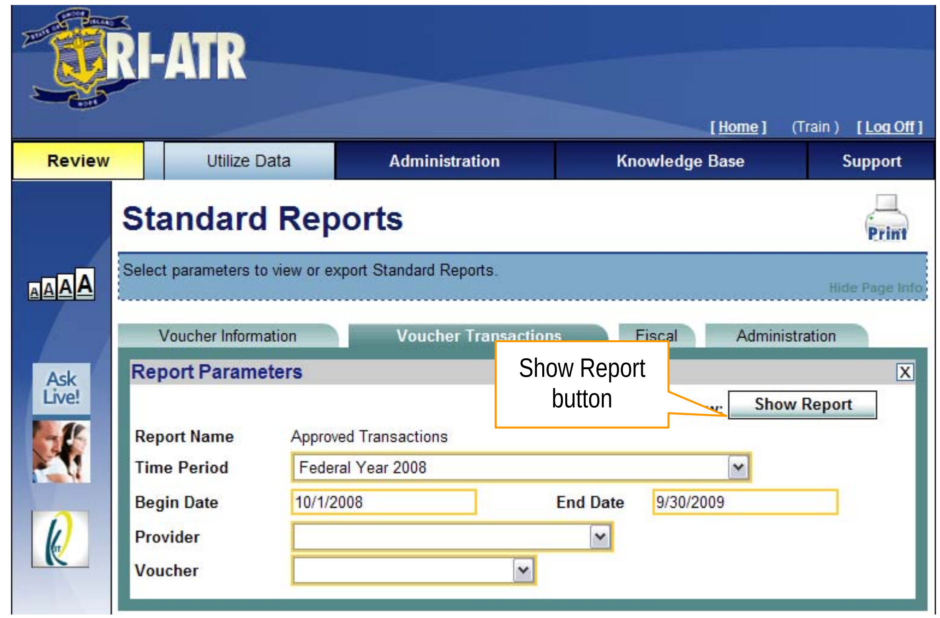
(This is a screenshot of the Standard Reports Page.)

Tips

- The Organization dropdown list for all reports is sorted alphabetically.
- The RI ATR Application has the print icon for easier access to viewing reports, you may need to have Active X installed on your computer to utilize the icon. Active X is a free download that should allow you to use the print icon, click on the link to access the Active X site: http://www.download.com/windows/activex/1921-2206_4-0.html if you are unable to download Active X, contact your organization's IT department.

Selecting a Report that requires Additional Data

1. Select the appropriate data from each of the required dropdown list.
2. To select a specific date range
   a. Select the **Fiscal Year** from the drop down list to fill in the **Begin Date** and the **End Date** fields with the beginning date and ending date of the selected time period.
   b. Enter the specific dates into the **Begin Date** and **End Date** fields as mm/dd/yyyy.
3. Click the Show Report (**Show Report**) button to bring up a new window with the report
4. A new window will open, to close the window, click on the X (X) in the upper right corner.



(This is a sample screenshot of the Standard Reports Page.)

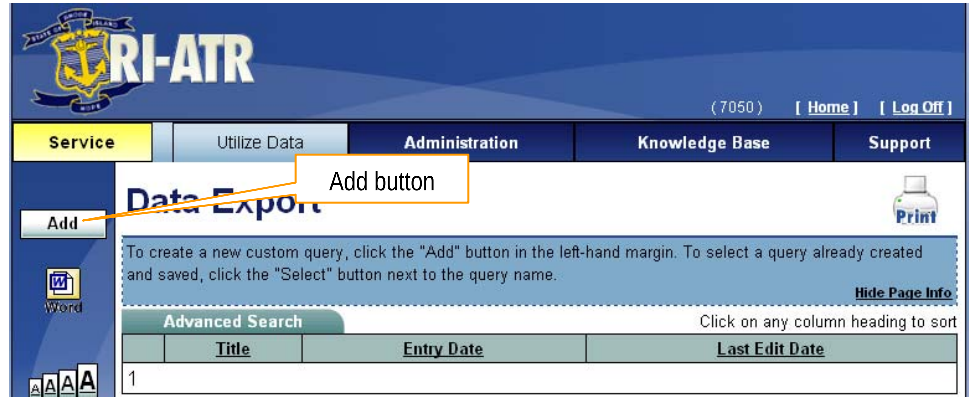
Tips

- If you have a pop-up blocker on your computer, hold the ctrl key on your keyboard down while selecting any button used to view the forms (e.g., Confidential Release Forms, PDF, etc.).

Data Export

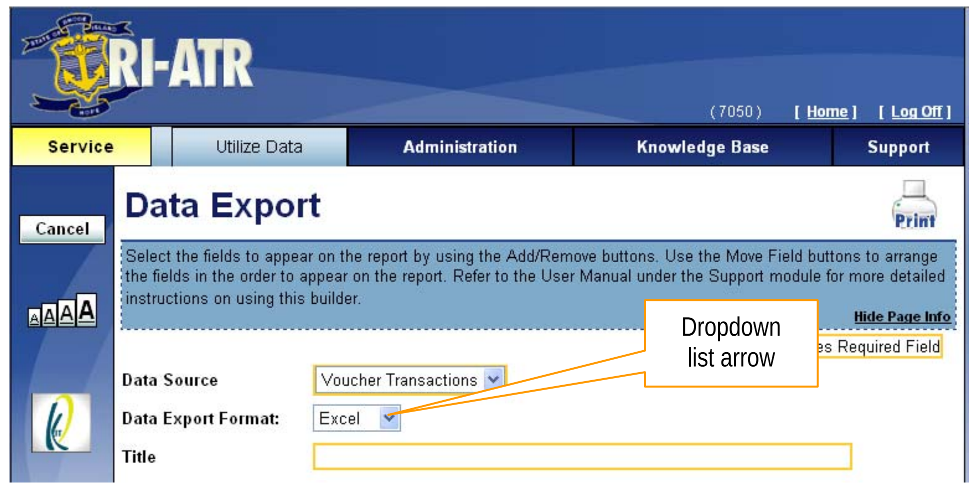
The Data Export module is used to export files of data in an Access or Excel document.

1. Click **Utilize Data** from the Menu.
2. Click **Data Export** from the Utilize Data Landing Page.
3. Click the Add (**Add**) button.



(This is a partial screenshot of the Data Export Page.)

4. Select the **Data Source** from the dropdown list.
5. Select the **Data Export Format** from the dropdown list.
6. Enter the name of the report in the **Title** field.

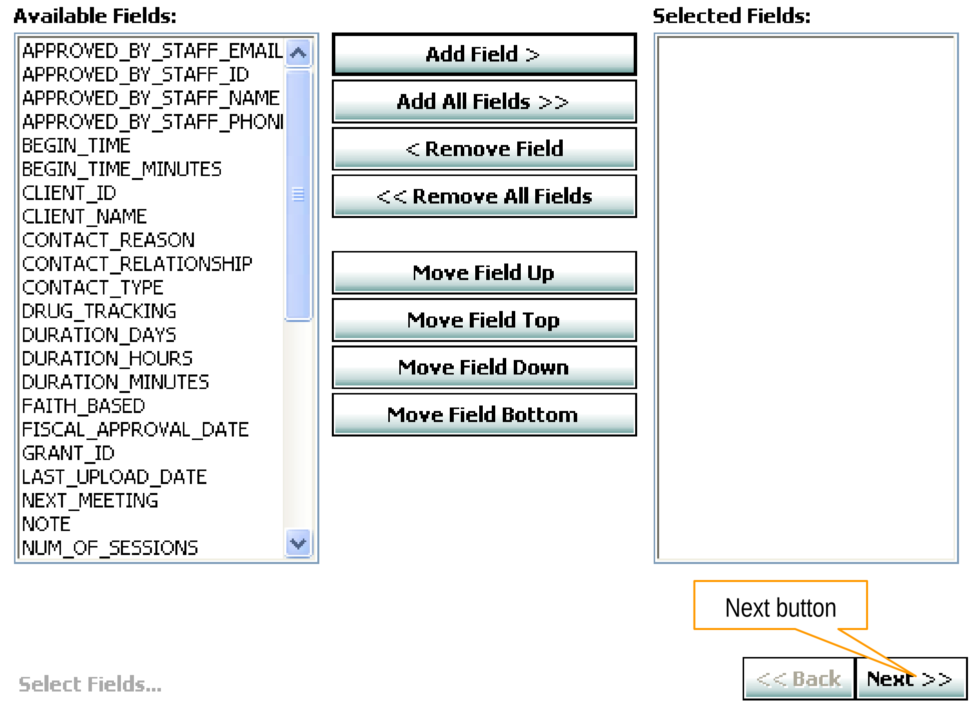


(This is a partial screenshot of the Data Export Landing Page.)

7. Choose from the **Available Fields** list by selecting the field names that you want to export and clicking the Add Field buttons to add to the **Selected Fields** list.

   *Note: Hold down the Ctrl key to make multiple selections.

8. Click the Next >> (Next) button when finished making selections.

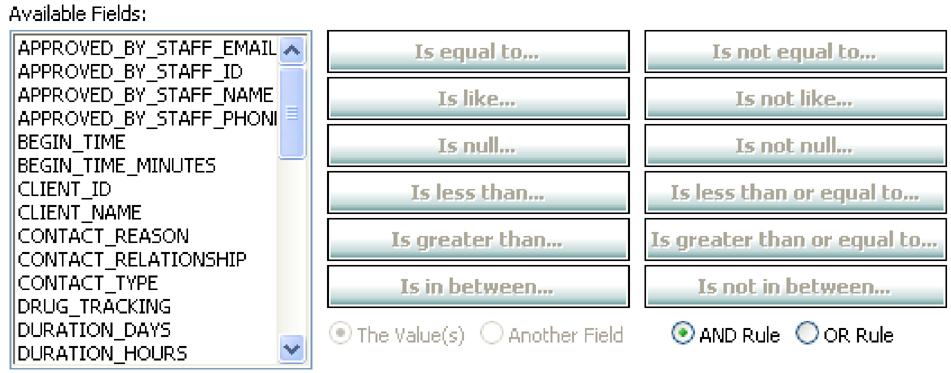


(This is a partial screenshot displaying the Available Fields to sort by option.)

The following table summarizes the buttons:

Button	Function
Add Field >	Moves only the selected fields from the **Available Fields** list to the **Selected Fields** list.
Add All Field >>	Moves All fields from the **Available Fields** list to the **Selected Fields** list.
< Remove Field	Removes only the selected fields from the **Selected Fields** list to the **Available Fields** list.
<< Remove All Fields	Removes All fields from the **Selected Fields** list to the **Available Fields** list.
Move Field Up	Moves only the selected fields up on the **Selected Fields** list.
Move Field Top	Moves only the selected fields to the top of the **Selected Fields** list.
Move Field Down	Moves only the selected fields down on the **Selected Fields** list.
Move Field Bottom	Moves only the selected fields to the bottom of the **Selected Fields** list.

9. Create filtering conditions by selecting from the Available Fields list and then clicking the appropriate buttons to the right to create rule parameters
   *Note: Hold down the Ctrl key to make multiple selections.
10. Use the radio buttons to adjust the filtering conditions by The Value, Another Field, AND Rule and OR Rule.



(This is a sample screenshot displaying the filtering options.)

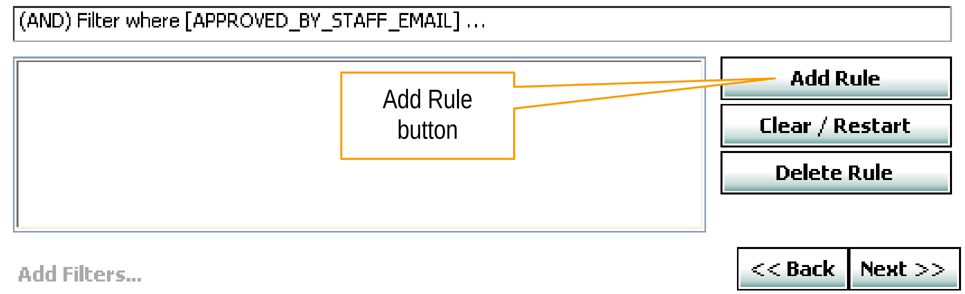
The following table summarizes the buttons:

Button	Function
Is equal to...	Is the same as the information selected
Is not equal to...	Is not the same than the information selected
Is like...	Is similar to the information selected.
Is not like...	Is different than the information selected.
Is null...	View no information for this field.
Is not null...	View all information for this field.
Is less than...	Is less than the information selected
Is less than or equal to...	Is less than or the same as the information selected
Is greater than...	Is greater than the information selected
Is greater than or equal to...	Is greater than or the same as the information selected
Is in between...	Is in between the values selected
Is not in between...	Is not in between the values selected

11. Click the Add Rule (**Add Rule**) button to create the filter.

*Note: To cancel a rule click the Clear / Restart (Clear/Restart) button or to delete a rule click the Delete Rule (Delete Rule) button.

12. Click the Next >> (**Next**) button.



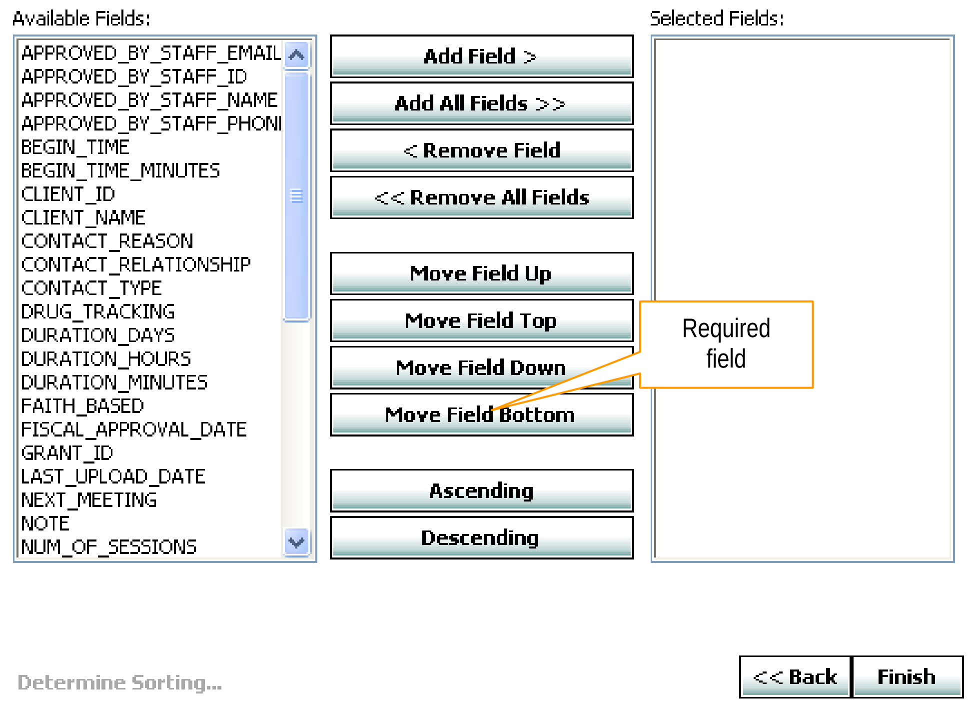
(This is a sample screenshot of more filtering options.)

13. Select the order by which the dataset should be sorted by choosing from the **Available Fields** list and selecting the field names you want to export and clicking the arrows to add a field to the **Selected Field** list.

*Note: Hold down the Ctrl key to make multiple selections.

14. Click the Finish (**Finish**) button when you are complete.

15. Click the Save (**Save**) button.



(This is a partial screenshot displaying the dataset options to sort the report by.)

Tips

- If you have a pop-up blocker on your computer, hold the ctrl key on your keyboard down while clicking on the Finish button to ensure that the Access or Excel document generates.

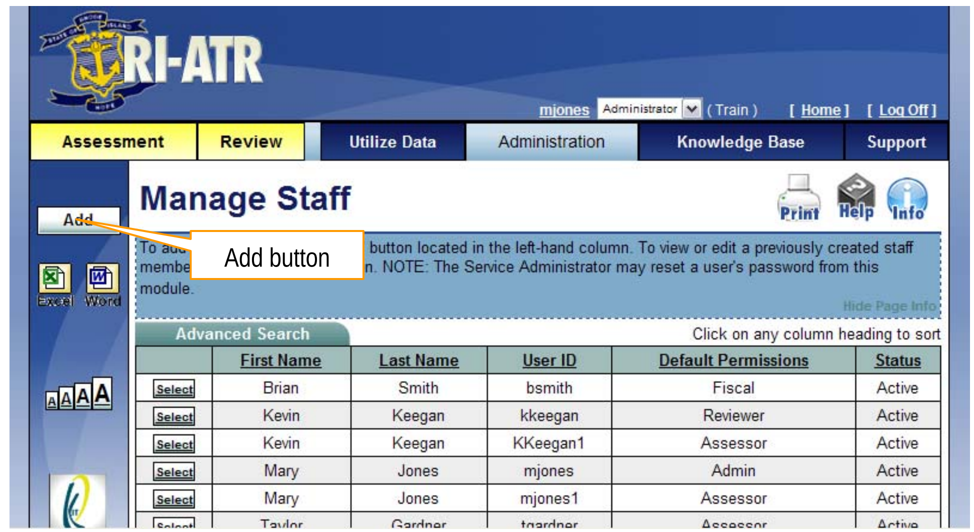
ADMINISTRATION

The Administration module is designed to complete administrative tasks within the application, such as updating organization information, staff registration, and changing a password.

Manage Staff

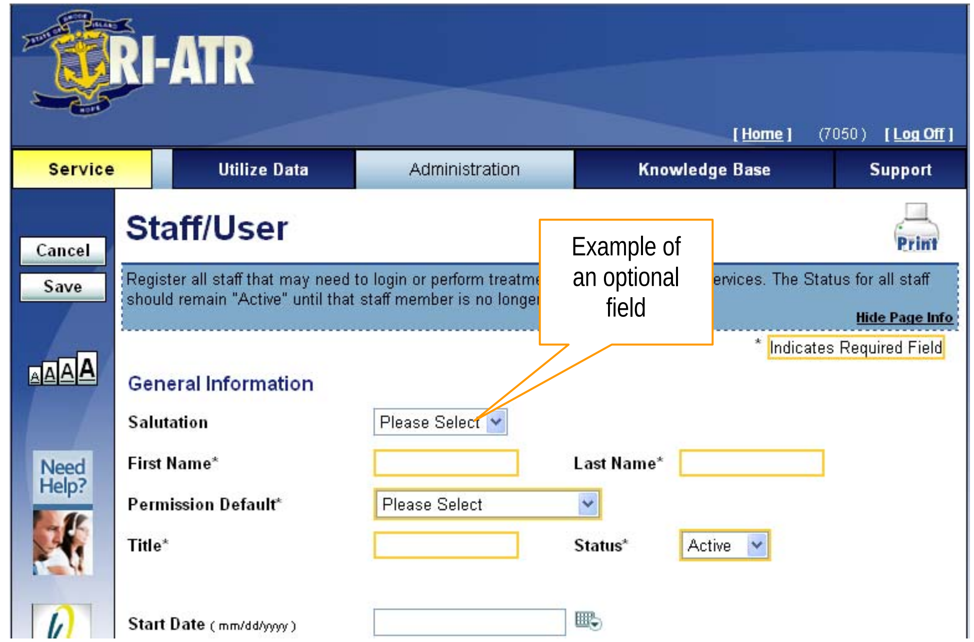
The Manage Staff module is used to register any staff members that should have access to the data entered within the application.

1. Click **Administration** from the Menu.
2. Click **Manage Staff** from Administration Landing Page.
3. Click the Add (**Add**) button.



(This is a sample screenshot of the Manage Staff Listing Page.)

4. Enter the staff member's **General Information**.
    a. Enter the staff member's first name in the **First Name*** field.
    b. Enter the staff member's last name in the **Last Name*** field.
    c. Select the staff member's permission level from the **Permission Default*** dropdown list.
    *Note: For a description of the levels, see the [Permission Default]() list.
    d. Enter the staff member's title in the **Title*** field.
    e. The **Status*** is defaulted to *Active*.
        i. *Active*: the staff member is currently with your organization (can be viewed on other screens and reports).
        ii. *Inactive*: the staff member is no longer with your organization (will no longer appear on other screens and reports).
    f. Enter details for optional fields, if desired.

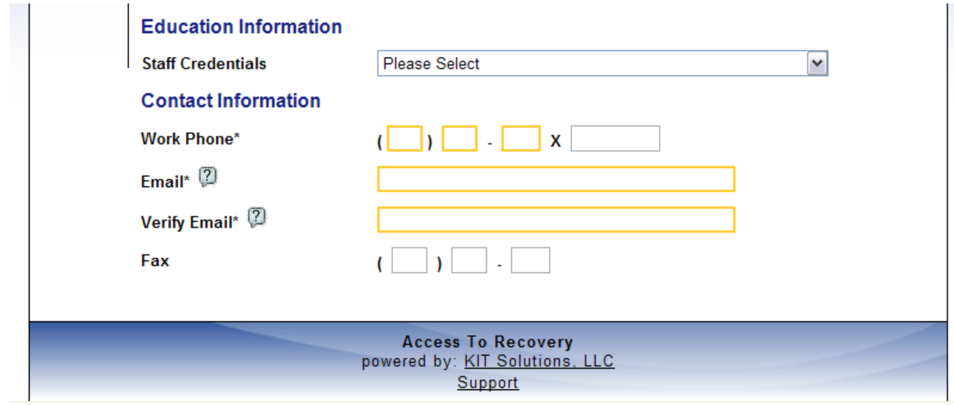


(This is a partial screenshot of the Manage Staff Profile General Information fields.)

5. Enter the staff member's **Login Information**.
    a. The **User ID*** will be the login name used by the staff member. This is automatically created after saving.
    b. The **Password*** field is where a temporary password is created for the staff member and can be any combination of alpha or numeric characters. This password will be used along with the User ID to log into the RI ATR application. Once a user logs in, they can use the [Change Password]() module to change the password to one of their liking.

(This is a partial screenshot displaying the Manage Staff Login Information fields.)

6. Enter the staff member's **Contact Information**.
   a. Enter the staff member's **Work Phone*** phone.
      *Note: The Work Phone must be filled out in three fields. The last field is optional for an extension number.
   b. Enter the staff member's **Email*** address and **Verify Email***.
7. Enter details for additional optional fields, if desired.
8. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any details, click the Cancel (Cancel) button.



(This is a partial screenshot displaying the Manage Staff Education Information and Contact Information fields.)

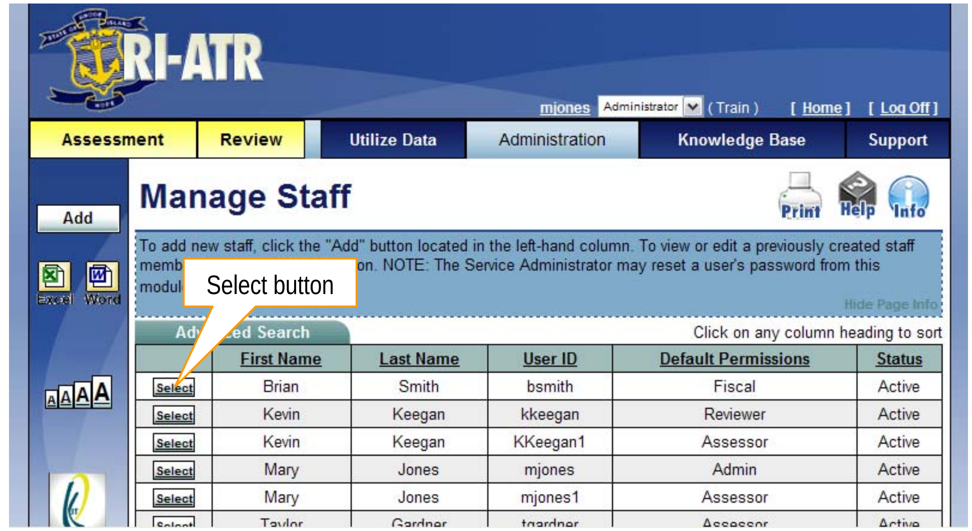
Tips

- Setting the **Status*** to *Inactive* is used to keep the staff members in the database for history purposes but removed from all of the staff lists on the forms. When a staff member leaves your organization you will not be able to delete the staff member, but you can change the **Status*** to *Inactive* to remove their name from forms and prevent the staff member from entering the application.
- Passwords can be any combination of letters, numbers, and/or characters.
- Passwords are case sensitive.

Permission Default	
Admin	Admin permissions should be given to the staff members that are acting as the primary contact for the RI ATR Service. The Admin permission level is the only level that can register staff.
Assessor	Assessor permissions should be given to the staff members that enter in the voucher information for approval. This permission is only available at the State level.
Fiscal	Fiscal permissions should be given to the staff members that are responsible for reviewing the voucher information for approval. This permission is only available at the State level.
Reviewer	Reviewer permissions should be given to the staff members that are responsible for reviewing the voucher information for approval to the Fiscal level. This permission is only available at the State level.

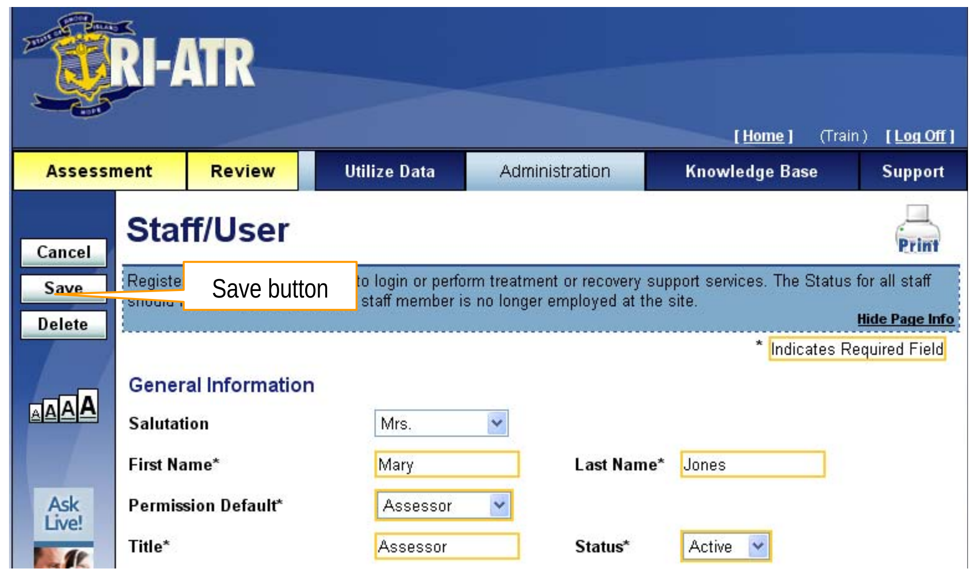
Editing Staff Information

1. From the **Manage Staff** Listing Page, select the staff member you wish to edit by clicking the Select (**Select**) button to the right of the staff member's name.
2. The staff member will appear in the edit mode.



(This is a sample screenshot of the Manage Staff Listing Page.)

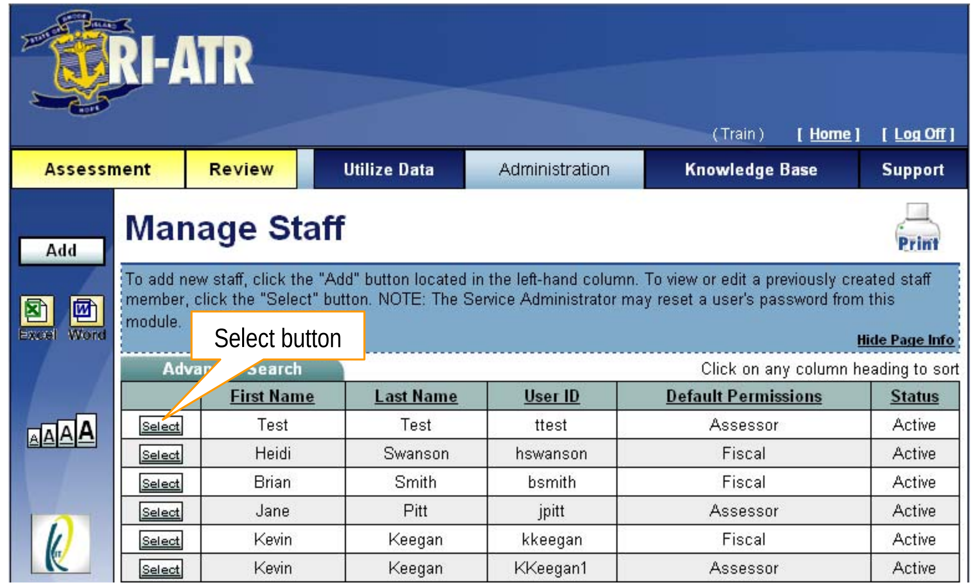
3. Make any changes needed to the details.
4. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.



(This is a sample screenshot of the Manage Staff Edit Form.)

Deleting Staff Information

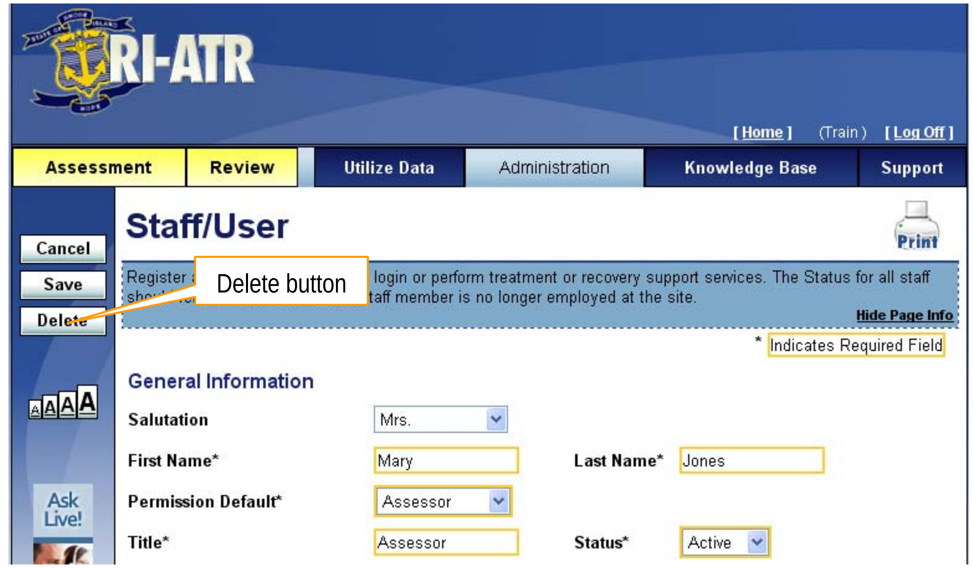
1. From the Listing Page, select the staff member you wish to delete by clicking the Select (**Select**) button to the left of the staff member's name.
2. The staff member will appear in the edit mode.



(This is a sample screenshot of the Manage Staff Listing Page.)

3. Click the (**Delete**) button from the left toolbar.

   *Note: To cancel the deletion, click the (Cancel) button.



(This is a sample screenshot of the Manage Staff Page Edit Form.)

Tips

- You will not be able to delete a staff member if it is associated with any other details. In this instance, set the **Status*** of the staff member to ***Inactive***.

Manage Facility

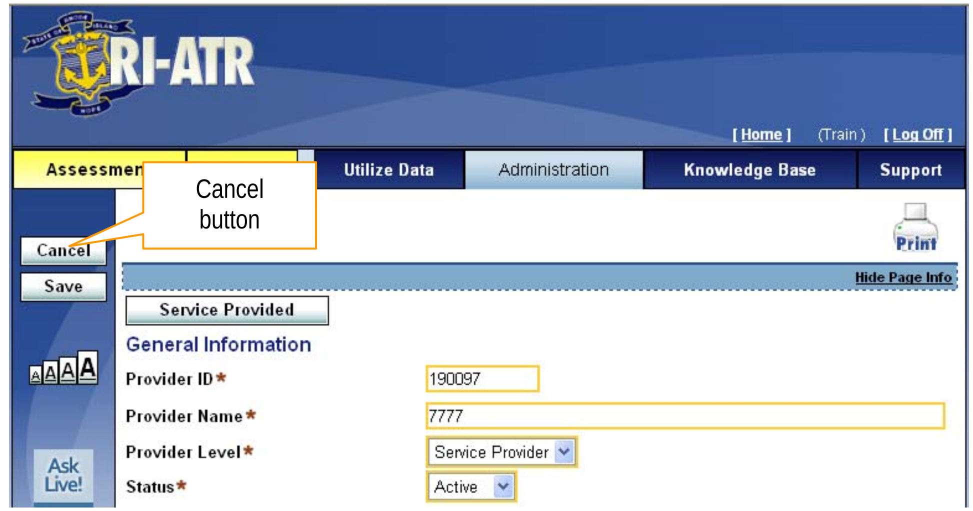
The Manage Facility module has fields that can be filled in with various pieces of information specific to your organization. The Primary Contact information will be useful to the state in case they have a question on any part of the data that has been entered into the application.

*Note: The staff member with the admin permission level is the only person capable of editing this screen within each organization.

1. Click **Administration** from the Menu.
2. Click **Manage Facility** from the Administration Landing Page.
3. To view organization information, click the Select (**Select**) button.

(This is a sample screenshot of the Manage Facility Listing Page.)

4. The organization information will display, make any necessary changes to the form.
5. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.

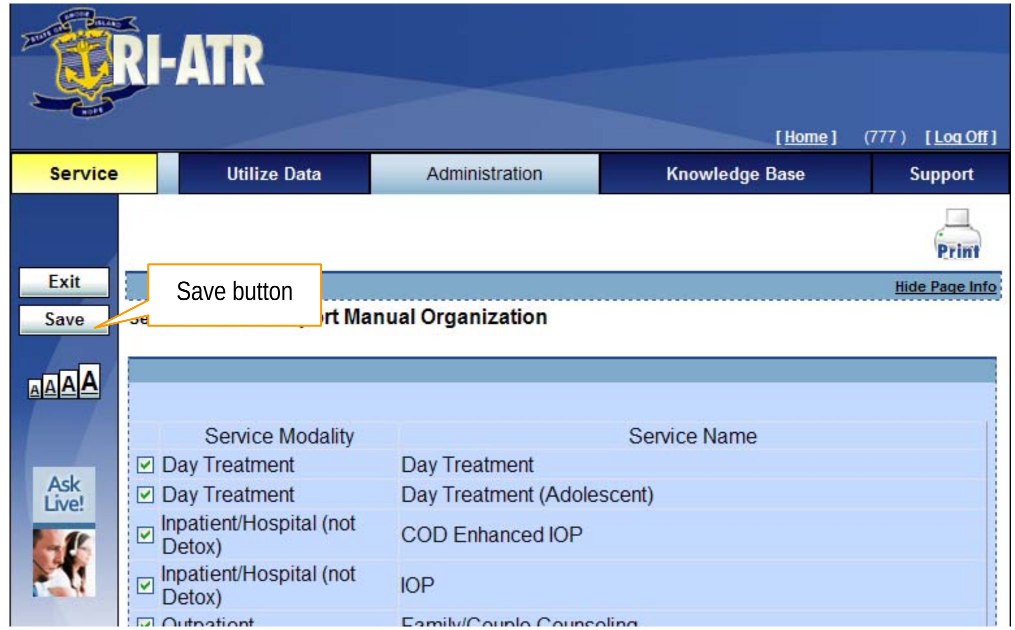


(This is a sample screenshot of the Manage Facility Page.)

Tips
- Only the state can change the Provider ID and Provider Name information. If any information is incorrect for your organization, submit a request through the online support site Contact Support link or contact the state.

Service Provided

1. From the **Manage Facility** edit page click the Service Provided (**Service Provided**) button.
2. Select the checkboxes to indicate the services you provide. Uncheck the checkboxes for services that your Organization does not provide.
3. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.



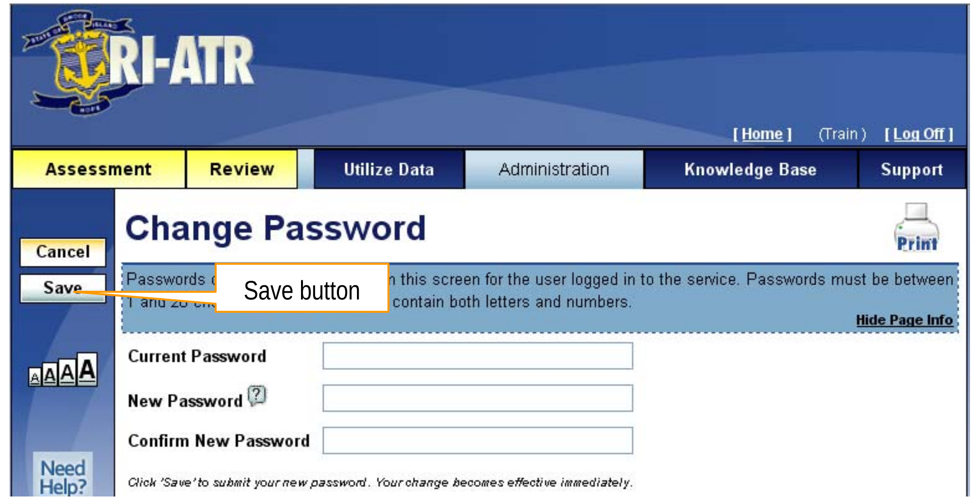
(This is a sample screenshot of the Services Provided page.)

Change Password

The Change Password module allows the user to change the password on the account they are currently logged into.

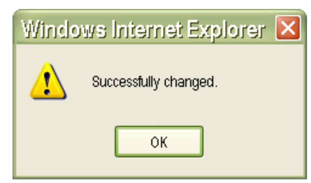
1. Click **Administration** from the Menu.
2. Click **Change Password** from the Administration Landing Page.
3. Enter the **Current Password** for the account.
4. Enter a password you would like to use in the **New Password** field.
5. Re-type the new password in the **Confirm New Password** field.
6. Click the (**Save**) button from the left toolbar.

   *Note: To exit the screen without saving any changes, click the (**Cancel**) button.



(This is a screenshot of the Change Password Landing Page.)

7. You will receive a confirmation message indicating the password was changed successfully. Click (**OK**) to continue.

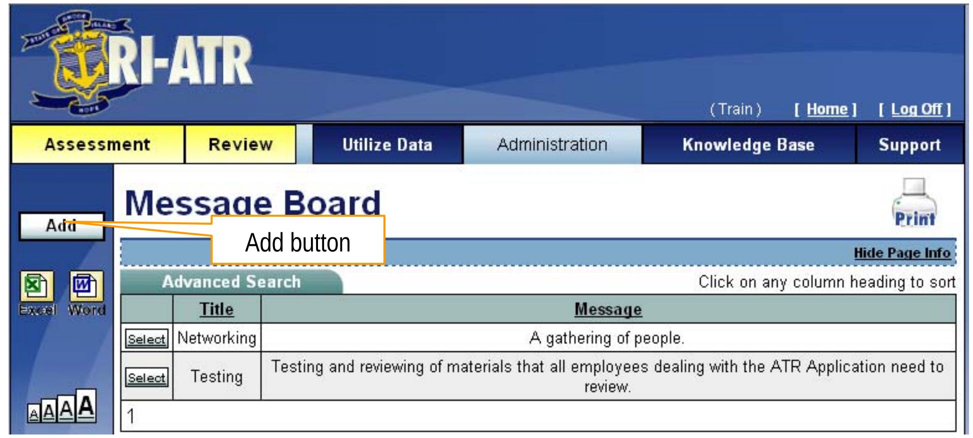


Tips

- It is important to remember that passwords are case sensitive.
- Passwords must be between 1 and 20 characters long and should contain a combination of letters, numbers, and/or characters.
- Passwords do not expire.

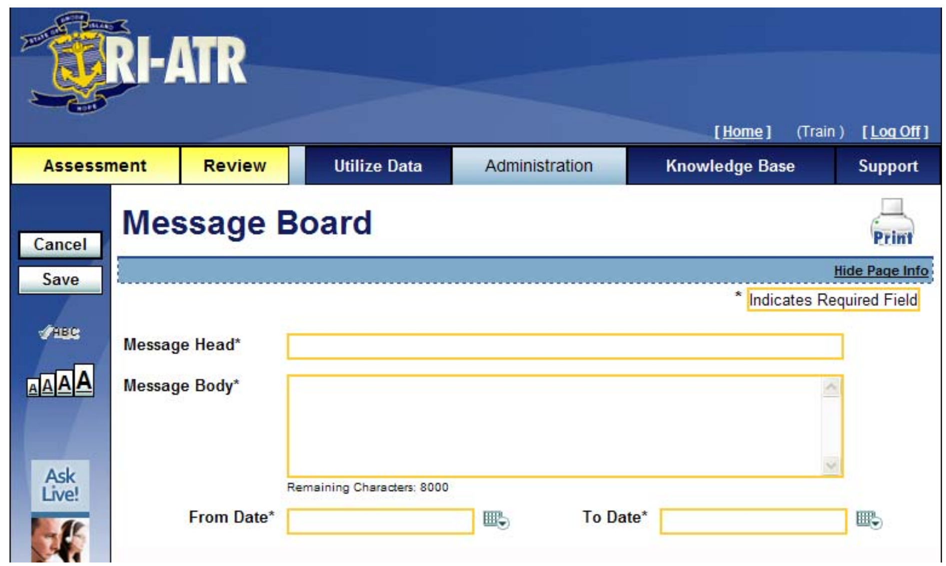
Manage Messages

The Manage Messages module is designed to add, edit or delete events in the calendar. Events added at county level will only be viewed by that county and their providers.



(This is a partial screenshot of the Manage Messages Listing Page.)

1. Click **Administration** from the Menu.
2. Click **Manage Messages** from the Administration Landing Page.
3. Click the Add (**Add**) button.



(This is a partial screenshot of the Events Manager Page.)

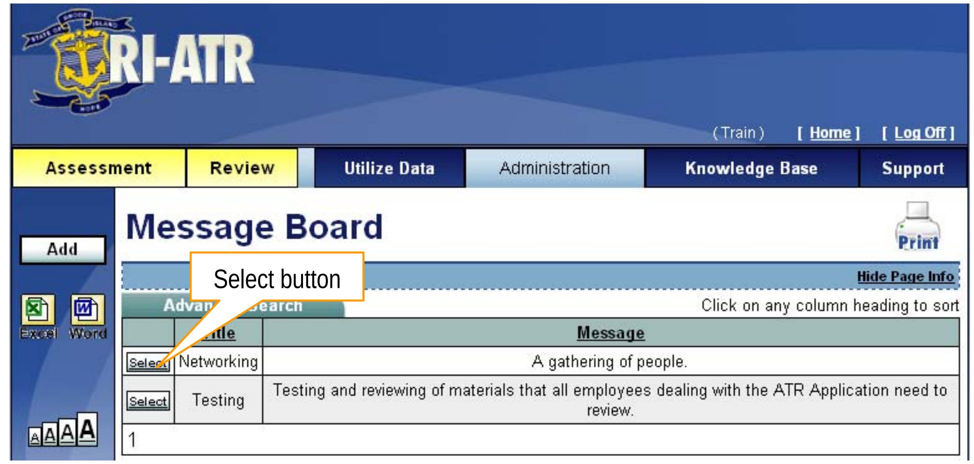
4. Enter a brief description of the event in the **Message Head*** field.
5. Enter the description of the event in the **Message Body*** field.
6. Enter the **From Date*** and the **To Date*** for when you would like the message to be displayed or click on the calendar. (See Calendar section for further details)

Tips

- You can also add or edit a message by clicking on the **Add/Edit Messages** link on the Home Page.

Editing Event Information

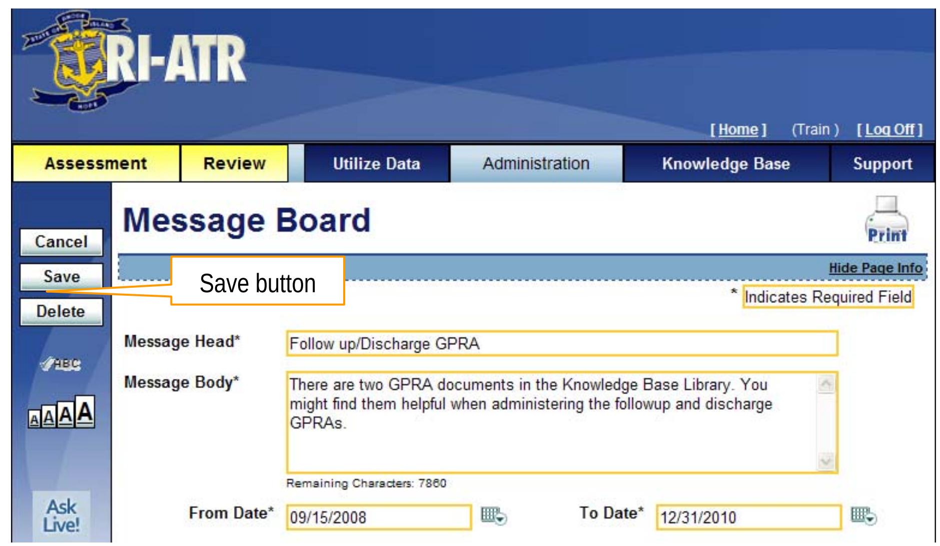
1. From the **Message Board** Listing Page, select the event you wish to edit by clicking the Select (**Select**) button to the left of the Event Title.
2. The event will appear in the edit mode.



(This is a sample screenshot of Message Board Listing Page.)

3. Make any changes needed to the details.
4. Click the Save (**Save**) button from the left toolbar.

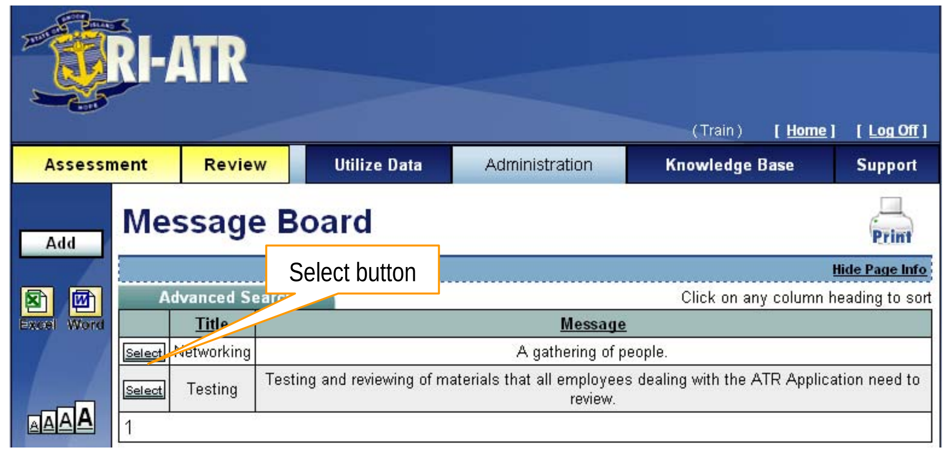
*Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.



(This is a sample screenshot of Message Board Edit Form.)

Deleting Event Information

1. From the **Message Board** Listing Page, select the event you wish to delete by clicking the Select (**Select**) button to the left of the Event Title.
2. The event will appear in the edit mode.

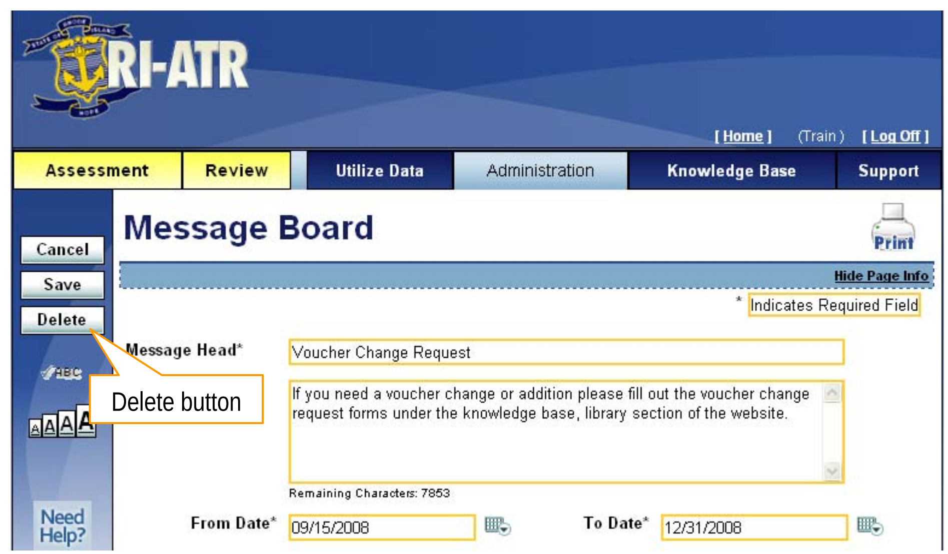


(This is a sample screenshot of Message Board Listing Page.)

3. Click the Delete (**Delete**) button from the left toolbar.

   *Note: To cancel the deletion, click the Cancel (Cancel) button.

   a. Notice that the event is no longer in the list.



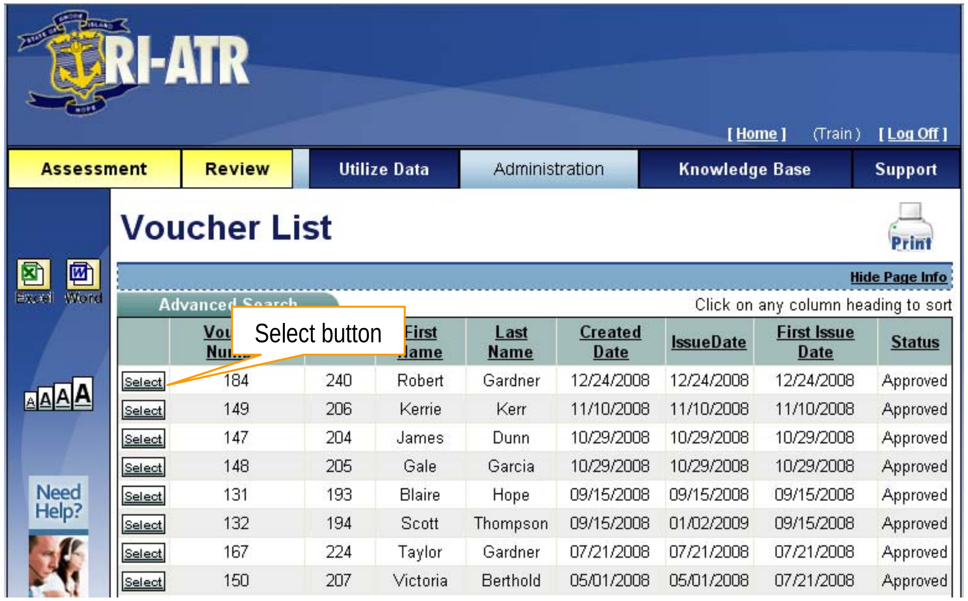
(This is a sample screenshot of Message Board Edit Form.)

Discharge/Follow-Up Voucher

The Discharge and Follow-Up Voucher link is used to access to Discharge and Follow-up vouchers. **This module is available at the State Level only.**
(***Note**: For a description of the levels, see the Permission Default list.)

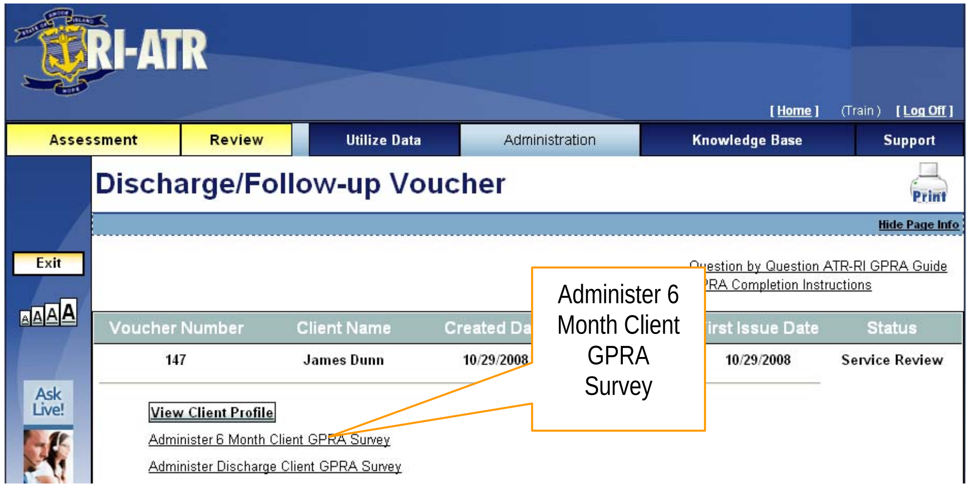
Administer 6 Month Client GPRA Survey

1. Click **Administration** from the Menu.
2. Click **Discharge/Follow-Up Voucher** from the Administration Landing Page
3. Select the client you wish to work by clicking the Select (**Select**) button to the left of the client's name.



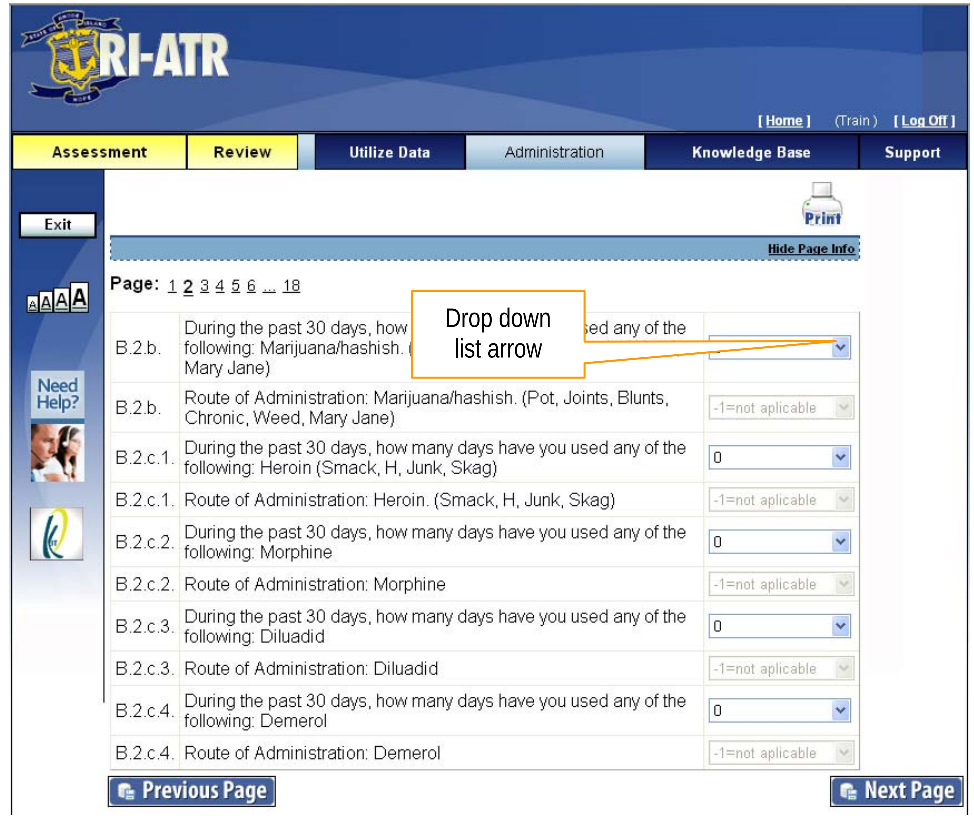
(This is a sample screenshot of the Voucher Listing Page.)

4. Click on the Administer 6 Month Client GPRA Survey link.



(This is a sample screenshot of the Discharge/Follow-Up Voucher Listing Page.)

5. Answer questions using the drop down list to the left of the question.
6. Click the Next Page (**Next Page**) button to continue to the next page of questions or click the Previous Page (**Previous Page**) button to return to return. (See table)
7. Continue in this manner until all the pages have been filled in.
8. Once you have answered all the questions, click the Exit (**Exit**) button on the last page.



(This is a partial screenshot of the GPRA Survey.)

Below are the buttons that allow you to move within the GPRA Surveys.

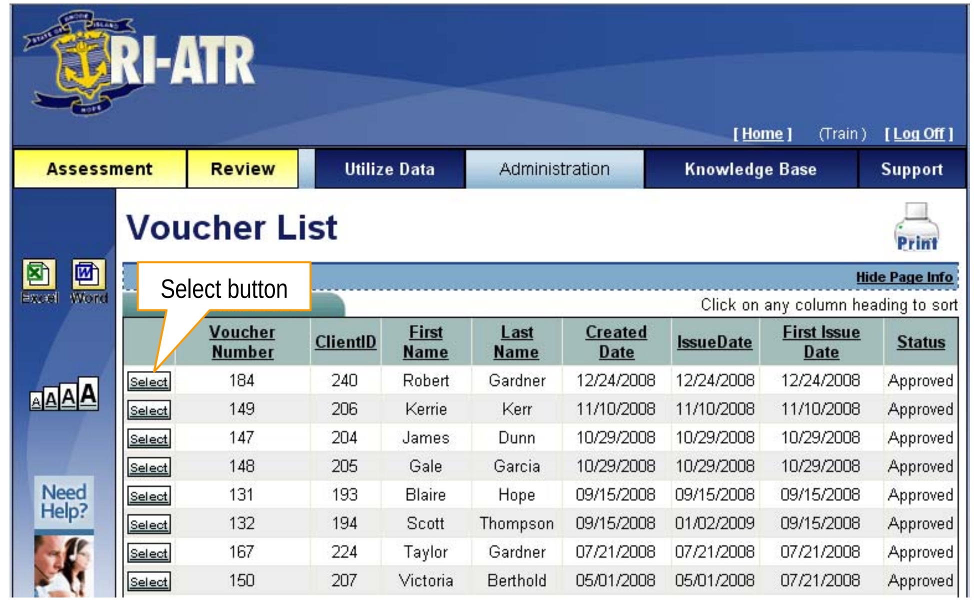
Next Page	This button moves you to the page directly after the one currently on
Previous Page	This button moves you to the page directly prior to the one currently on.

Tips

- Clicking on the Next Page (**Next Page**) button will automatically save the current page.

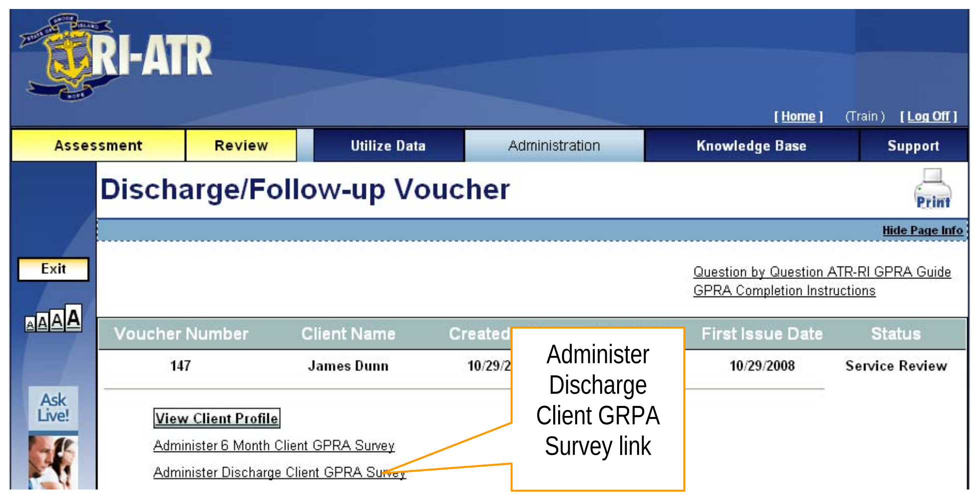
Administer Discharge Client GPRA Survey

1. Click **Administration** from the Menu.
2. Click **Discharge/Follow-Up Voucher** from the Administration Landing Page
3. Select the client you wish to work by clicking the Select (**Select**) button to the left of the client's name.



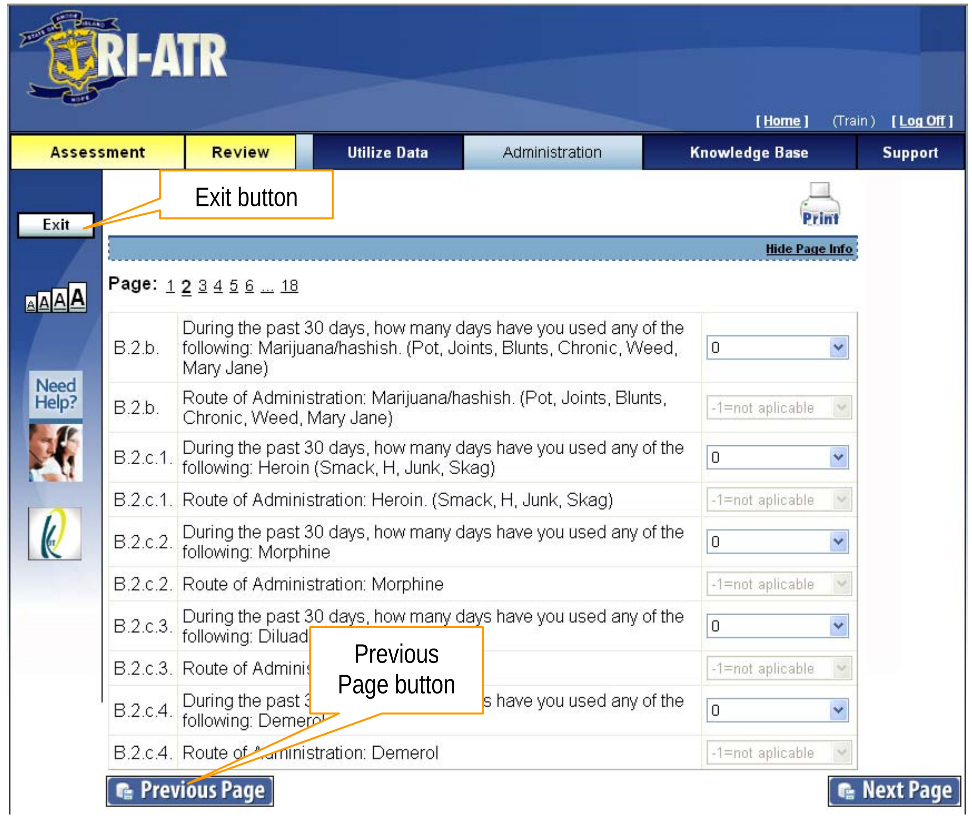
(This is a sample screenshot of the Voucher Listing Page.)

4. Click on the Administer Discharge Client GPRA Survey link.



(This is a sample screenshot of the Discharge/Follow-Up Voucher Listing Page.)

5. Answer questions using the drop down list to the left of the question.
6. Click the (**Next Page**) button to continue to the next page of questions or click the (**Previous Page**) button to return to return.
7. Continue in this manner until all the pages have been filled in.
8. Once you have answered all the questions, click the (**Exit**) button on the last page.



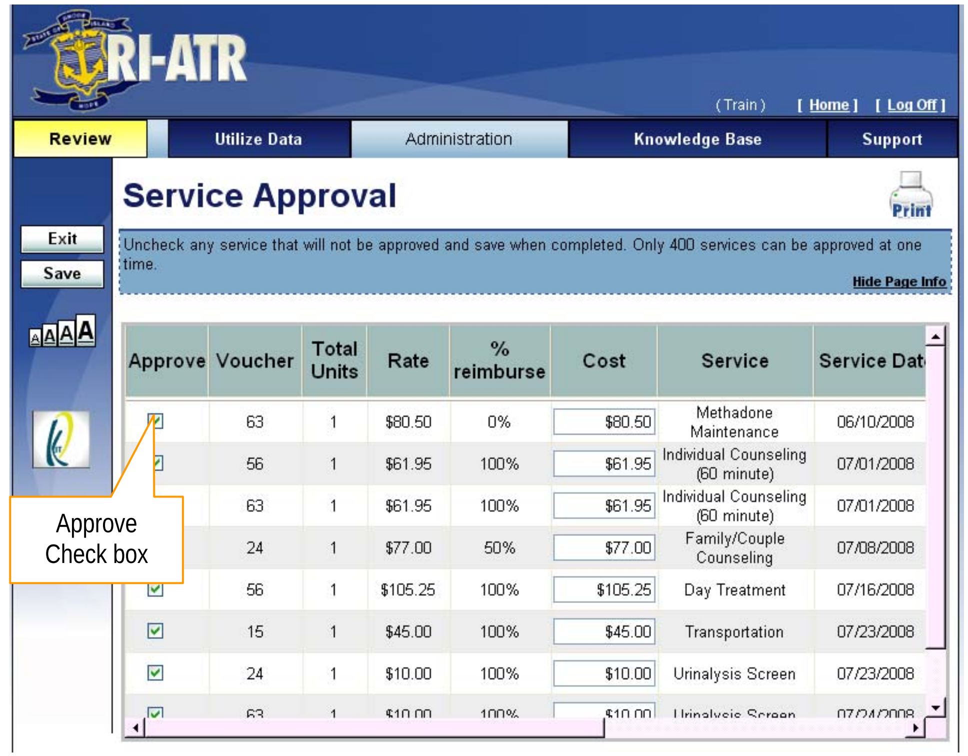
(This is a sample screenshot of the GPRA Survey.)

Fiscal Service Approval

This module is designed to allow for approval of Service Plans that have been completed. **This module is for the staff members who have the Fiscal Permission level.**
(***Note**: For a description of the levels, see the Permission Default list.)

1. Click **Administration** from the Menu.
2. Click **Fiscal Service Approval** from the Administration Landing Page
3. A grid displaying the approved voucher services will display.
4. Uncheck any service that is not being approved by clicking the box to the left of the Voucher.
5. Click the Save (**Save**) button on the left toolbar.

   *Note: To exit the screen without saving any changes, click the Exit (**Exit**) button.



(This is a sample screenshot of the Service Approval Listing Page.)

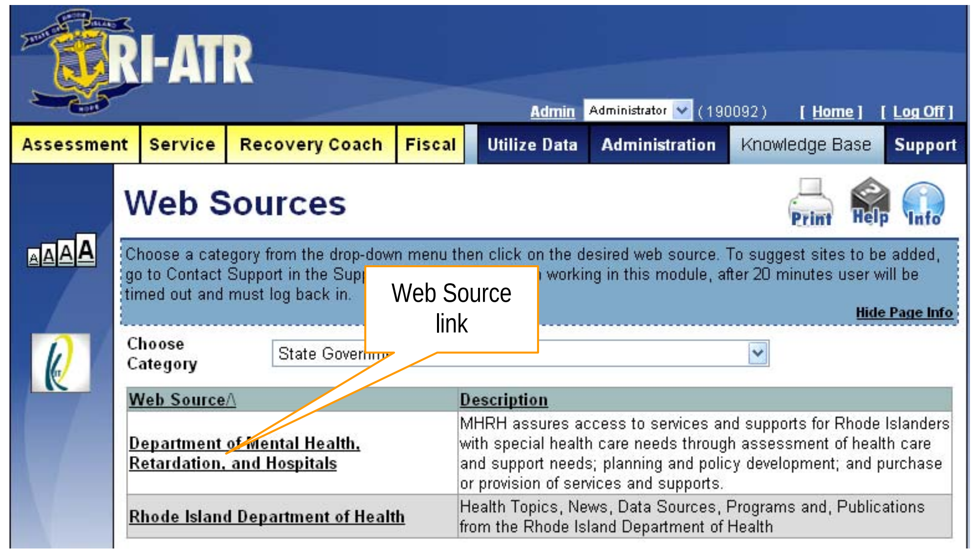
KNOWLEDGE BASE

The Knowledge Base module is a warehouse of documents and web source information designed to provide pertinent data.

Web Links

The Web Sources section of Knowledge Base is useful for finding a wealth of prevention links. The Web Source section can be utilized by following these steps:

1. Click **Knowledge Base** from the Menu.
2. Click **Web Links** from the Knowledge Base Landing Page.
3. Select a category from the **Choose Category** dropdown list.
4. Browse the Web Sources List for the website you would like to visit.
5. Click on the link of the name of the **Web Source**.
6. A new window will open displaying the website you chose.
7. To close the new website window, click on the (X) in the upper right hand corner.
8. Click **Knowledge Base** from the main menu to return to the Knowledge Base Landing Screen



(This is a partial screenshot of the Web Sources Listing Page.)

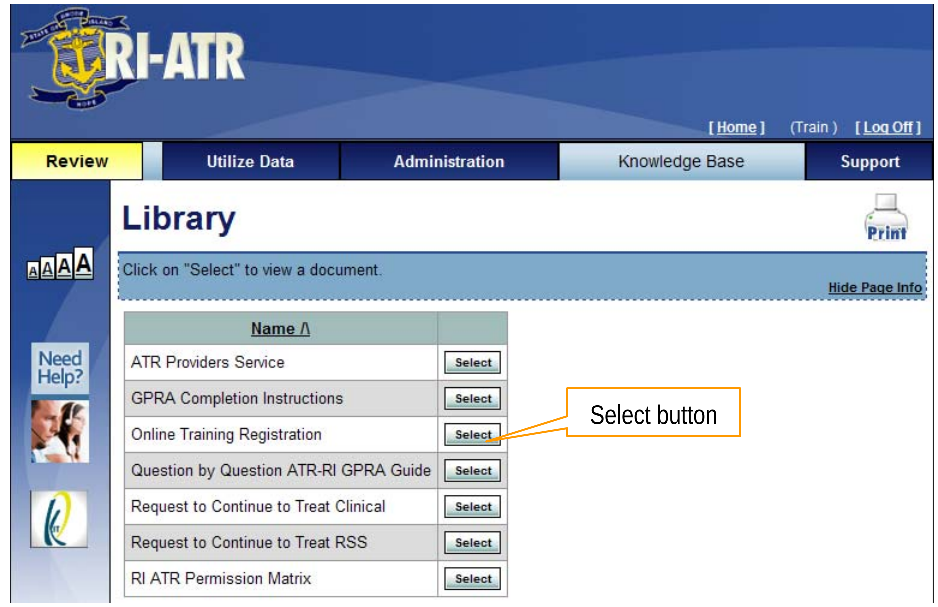
Tips

- If you have a pop-up blocker on your computer, hold the ctrl key down while selecting any button used to view the websites.
- On the left column of the table is the Web Source link and on the right column of the table is the description.

Library

The Library section is a repository of commonly requested documents and other general documents that ATR would like to make available. Use the following instructions to view the Library section.

1. Click **Knowledge Base** from the Menu.
2. Click **Library** from the Knowledge Base Landing Page
3. Select the document you would like to view by clicking the Select (**Select**) button to the right of the **Name**.
4. The document will open as a new word document.
    a. Click the print button to print the document.
    b. Click the disk button to save the document.
    c. To close the .doc window, click on the X (X) in the upper right hand corner.
5. Click **Knowledge Base** from the main menu to return to the Knowledge Base Landing screen.



(This is a partial screenshot of the Library Listing Page.)

Tips

- The documents in the Library section are updated at the state-level.

SUPPORT

Clicking **Support** from the Menu will open the RI ATR Support Site (this will open in a new window). The RI ATR Support Site offers several features to assist you with using the RI ATR application.

1. To reach the RI ATR Support Site, click Support from the Menu. A new window will open displaying the Support Site.
2. To submit a problem, question, or suggestion for improvement, click the **Contact Support** link.
3. To find this manual in an online version, click the **Manuals** link. The Manuals page will open displaying various documents pertinent to the RI ATR application.
4. To see a list of new features, improvements, or announcements for the RI ATR application, click the **What's New** link.
5. To view frequently asked questions regarding the RI ATR application, click the **FAQs** link.
6. To view and download documents pertaining to the RI ATR application, click the **Library** link.

(This is a screenshot of the Support Site Home page.)

